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User's/Administrator's Companion Guide: Standard Edition

# SAMS I&R

1.10.x



SAMS 1.10.x

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# Introduction

The Synergy Aging Suite by Harmony is pleased to offer SAMS I&R™, which integrates the powerful information and referral features of BeaconIR™ with SAMS®, the leading consumer management software solution.

The integration of Beacon's I&R functionality directly within SAMS addresses the wishes of Beacon users nationwide, and specifically results from the Beacon Summit Meeting in Chicago in late 2006.

Beacon and SAMS now share the same consumer and provider databases. The call interface has been re-designed to enhance ease of use and to improve searching capabilities. You can easily merge SAMS Consumers and I&R Consumers, or enroll I&R Consumers for SAMS services. Basically, you get the best of both SAMS and Beacon in one program!

This model is ideal for the 'No Wrong Door'/'Point of Entry'/'Resource Center' models, since I&R is built into the larger case management system and the new features include the ability to electronically refer consumers to other organizations through SAMS.

## I&R Features

SAMS includes these popular I&R features:

- **Call Timing and Tracking** - Track start and end times of incoming and outgoing phone calls automatically. You can also pause calls - SAMS I&R keeps a running timer of how long a call has been paused.
- **Assessments** - search for and create assessments from within a call, or in a consumer record. You can also create assessments for anonymous consumers.
- **Advanced Search and Referral** - new real-time search functionality automatically searches on locations, services, and program characteristics, returning results as you type. Program referrals are recorded in the call record.
- **Topic Tracking and Journaling** - track topics discussed and enter notes about each call.
- **Activities** - Make referrals to other SAMS Agencies and Providers and easily schedule call backs, informational e-mails, and mailings during a call.
- **Call Log Management** - manage call records after completed calls. Search for call records based on different criteria in the call log.

- **Service Delivery** - service delivery templates allow you to automatically create various types of service deliveries in a call record, as well as auto-enroll consumers for services.
- **Reports** - choose from several highly customizable I&R reports to help you make the most of your organization's call information.

### Using this Guide

This companion guide is meant to supplement the SAMS User's Guide and SAMS Administrator's User's Guide. It provides only an overview of the I&R features within SAMS. It is divided up into the following sections:

- *Customizing SAMS I&R* - looks at setting up *I&R Settings* in the **Options** menu.
- *Managing I&R Consumers* - discusses the *I&R Consumer* list.
- *Call - Summary Screen* - outlines the parts of *Call - Summary* screen and the procedures used for entering call information.
- *Using the Call Log* - an overview of *Call Log* features.
- *Call Navigation Pane* - outlines the procedures used for entering call information using the *Call - Summary* screen's call navigation pane.
- *Reports* - looks at the I&R reports available to you.
- *I&R Administration* - a table for SAMS Administrators that outlines I&R setup within SAMS Administrator.

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# Typographical Conventions

Before you start using this guide, it is important to understand the terms and typographical conventions used in the documentation.

For more information on specialized terms used in the documentation, see the Glossary at the end of this document.

The following kinds of formatting in the text identify special information.

Formatting convention	Type of Information
Triangular Bullet(➤)	Step-by-step procedures. You can follow these instructions to complete a specific task.
Special Bold	Items you must select, such as menu options, command buttons, or items in a list.
<i>Emphasis</i>	Use to emphasize the importance of a point or for variable expressions such as parameters.
CAPITALS	Names of keys on the keyboard. for example, SHIFT, CTRL, or ALT.
KEY+KEY	Key combinations for which the user must press and hold down one key and then press another, for example, CTRL+P, or ALT+F4.

# Customizing SAMS I&R

*Customizing SAMS I&R* describes the ways you can customize SAMS I&R defaults to improve your work flow using **Options** in the **Tools** menu.


For more information about the other settings in **Options**, use the SAMS Help files. To access the Help files, select **Search** from the **Help** menu and enter the appropriate term.

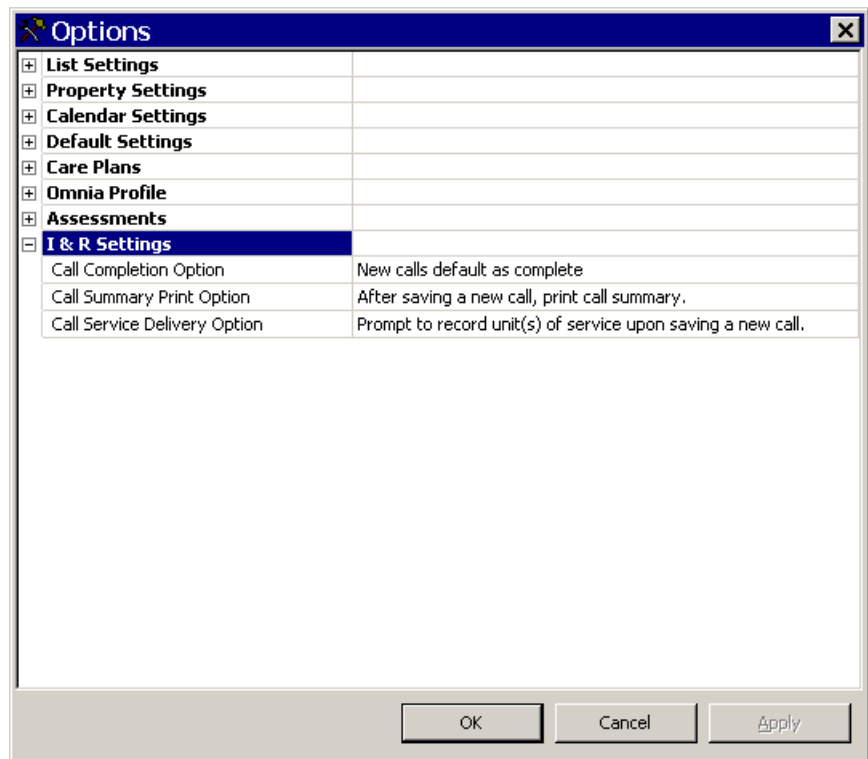


## Configuring I&R Settings

*I&R Settings* offers default call options to help you better manage calls. Your user role must have permission to modify the settings.

➤ *To change I&R settings*

- 1 From the Tools menu, select **Options....**
- 2 If not already displayed, click the plus sign  to expand the *I&R Settings* heading.



- 3 Under *Calls Completion Option*, select a default for completed calls. If you select **New calls default as complete**, a check automatically appears in the *Complete?* column of the *Call Log* screen. If you select **New calls default as incomplete**, no check appears. **Prompt to complete new calls on save** forces users to select **Complete** or **Incomplete** at the end of each call.
- 4 Under *Call Summary Print Option*, select whether you want to have SAMS automatically print a call summary, an anonymous call summary, a custom call summary, or no call summary after saving a new call. *Anonymous Call Summaries* do not include any personal consumer data. *Custom Call Summaries* print only the Call Sections you select in the *Print Call* screen.

- 5 Under *Call Service Delivery Option*, decide how (or if) you want service deliveries to be recorded when saving a call. Choose to have SAMS automatically record units of service against a consumer (or a consumer group if the caller is anonymous), to prompt users to record units of service when saving a call, to have SAMS automatically record units of service against the call's consumer, or to not record units of service at all upon saving a new call.

# Managing I&R Consumers

An *I&R Consumer* is any consumer that has never been enrolled for services. Typically, these are your Callers. You can use the *I&R Consumers* list to manage I&R Consumers just as you use the *Consumers* list to manage regular SAMS consumers. The *I&R Consumers* list features are nearly identical to the *Consumers* list.

You'll notice that a new **I&R Consumer** type has been added to the *Type* filter in the *Consumers* list. Selecting **I&R Consumers** from the *Type* filter limits the *Consumers* list view to only I&R consumers. When you access the *I&R Consumers* list, an **Enroll for Services** button appears on the toolbar. See ***Enrolling an I&R Consumer for Services*** (on page 17) for more information.

You can use the *I&R Consumers* list to access, delete, or deactivate an I&R Consumer, to register an I&R Consumer, to view the properties of an I&R Consumer, or to do anything else that you would normally do from the *Consumers* list. You can also access the ***I&R Consumer Summary Screen*** (on page 9) from the *I&R Consumers* list.

For more information on using the *I&R Consumers* list features, see the SAMS User's Guide or Help files. To access the Help files, select **Search** from the **Help** menu and enter the appropriate search terms - e.g. 'viewing consumer properties' or 'deactivating a consumer.'

Note that you can merge an I&R consumer and a regular SAMS consumer. However, you can only merge an I&R Consumer into a SAMS Consumer. You cannot merge a SAMS Consumer into an I&R Consumer.

Social Assistance Management System - [I & R Consumers]

File Edit View Tools Window Help

Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoices Payments

New Call Call Log Search for Services

Call Log I & R Consumers

Close Consumers Register New Open Delete Properties Assessments Contacts LIS Application

I & R Consumers (All) (All) Apply Clear Filter Find Search Enroll for Services Merge

Consumers  
Consumer Groups  
Caregivers  
I & R Consumers

Frank Name Previous Next Sort Current Page

Sorted By Name

ID	Name	Date Regi...	Address	Town of Residence	County of Residence	Home Phone	Ac...	Status Date
1351241487	110 Bengston, Harold	03/21/2008	333 Way	Auburn	Worcester		<input checked="" type="checkbox"/>	03/21/2008
1391167413	110 Dye, Tie	03/26/2008					<input checked="" type="checkbox"/>	03/26/2008
1339536029	110 Hobson, David	03/19/2008	1 Brown St	Pittsfield	Berkshire	(413) 447-8899	<input checked="" type="checkbox"/>	03/19/2008
1363714080	110 Phone, Bell	03/25/2008		Woburn	Middlesex	(781) 457-5545	<input checked="" type="checkbox"/>	03/25/2008
1371606951	110 Spring, Mark	03/25/2008	10 Springer Lane	Arlington	Middlesex	(781) 641-1070	<input checked="" type="checkbox"/>	03/25/2008
1344768321	110, Anonymous	03/17/2008					<input checked="" type="checkbox"/>	03/17/2008
1358339655	110, Bea	03/12/2008				(508) 435-4412	<input checked="" type="checkbox"/>	03/12/2008
1326428950	110, Betty	03/13/2008	35 Washington St.	Boston		(617) 222-5546	<input checked="" type="checkbox"/>	03/13/2008
1320806527	110, Brandy	03/12/2008					<input checked="" type="checkbox"/>	03/12/2008
1319472468	110, Carmen	03/14/2008	6 Greenview St., Apt. 16	Framingham	Middlesex	(508) 872-3790	<input checked="" type="checkbox"/>	03/14/2008
1390055030	110, Cheri	03/17/2008	83 Long Ave	Framingham	Middlesex	(617) 504-1754	<input checked="" type="checkbox"/>	03/17/2008
1303794503	110, Debby	03/17/2008	14 Arlene Dr	Framingham	Middlesex	(508) 879-7008	<input checked="" type="checkbox"/>	03/17/2008
1325471163	110, Debby	03/17/2008		San Diego		(760) 535-7684	<input checked="" type="checkbox"/>	03/17/2008
1353069269	110, Donna	03/11/2008				(401) 831-3425	<input checked="" type="checkbox"/>	03/11/2008
1307654977	110, Earl	03/18/2008				(978) 779-3000	<input checked="" type="checkbox"/>	03/18/2008

# I&R Consumer Summary Screen

The *I&R Consumer Summary* screen is a pared down version of the regular *Consumer Summary* screen. The consumer summary navigation pane contains only 5 sections: **Summary**, **Details**, **Assessments**, **Consumer Journal**, and **Call History**. The **Details** section has also been streamlined for I&R consumers. It contains only *General*, *Contacts*, *Locations*, *Phones*, *User Fields*, and *Ethnic Races* areas.

You can enroll an I&R consumer for services from this screen, as well. See ***Enrolling an I&R Consumer for Services*** (on page 17) for more information.

Since the SAMS User's Guide and Help files cover the *Consumer Summary* screen in great detail, this section provides only an overview of these areas.

Use Filter, Find, or Search if necessary to locate a record. See the SAMS User's Guide or Help files to learn more about these features.

➤ *To access the I&R consumer summary screen*

- 1 Click **Consumers** on the toolbar.
- 2 From the *Type* filter, select **I&R Consumers**.
- 3 In the *I&R Consumers* list, find the appropriate record.
- 4 Double-click the record to open it.

-OR- Highlight the record and click **Open** on the toolbar. -OR- Right-click and select **Open I&R Consumer**. -OR- CTRL+O.

**Social Assistance Management System - [110 Bengston, Harold - Consumer]**

File Edit View Tools Window Help

Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoices Payments

New Call Call Log Search for Services

I & R Consumers 110 Bengston, Harold - Consumer

Close Consumer Save Save and Close Enroll for Services

110 Bengston, Harold 1351241487 Unknown Unknown

**110 Bengston, Harold - Consumer Summary**

**Personal**

Client ID	1351241487
SSN	Not Specified
Date of Birth / Age	Unknown / Unknown
Gender	Male
Marital Status	Not Specified
Language	English
Home Phone	Not Specified
Info Release Authorized	Yes
Date Registered	
Consumer Details Last Reviewed	
Active	Yes

**NAPIS**

Ethnicity	Unknown
In Poverty	Don't Know
Lives Alone	Don't Know
High Nutritional Risk	Don't Know
Is Rural	No
Number of ADLs	Not Assessed
Number of IADLs	Not Assessed

**Residential Address**

333 Way  
Auburn, MA 01501  
County of Worcester

**Notes**

Caller needed SDC referred to NEDC

**Consumer Journal**  
(0 Journal Entries)

**Consumer Summary Navigation pane**

**Consumer Summary screen**

SYSADMIN SAMS2K\_MA\_FIELDTEST 4/15/2008 12:50 PM

- 5 View or modify **Details** (see "Consumer Details" on page 11), **Assessments** (see "Consumer Assessments" on page 12), **Consumer Journal** (on page 13), and/or **Call History** (see "Consumer Call History" on page 14) as needed. The headings in the *Consumer Summary* screen act as hyperlinks. Click a heading to go that area of the consumer record.
- 6 When you are ready, click **Save** or **Save and Close**.

## Consumer Details

For more detailed information on the Consumer Record or Details, see the SAMS User's Guide or the SAMS Help files.

Your user role must have permission to view, create, update, or delete a call details.

➤ *To view, add, modify, or delete details*

- 1 Access the appropriate consumer record as outlined in *I&R Consumer Summary Screen*.
- 2 Click **Details** in the consumer summary navigation pane.
- 3 View, add, modify, or delete information in the *General*, *Contacts*, *Locations*, *Phones*, *User Fields*, and/or *Ethnic Races* areas as necessary.
- 4 Click **Save** to save your changes and move to a different area of the record, or click **Save and Close** to close the record and return to the *I&R Consumer* list.

The screenshot displays the SAMS application window titled "Social Assistance Management System - [110 Bengston, Harold - Consumer]". The interface includes a menu bar (File, Edit, View, Tools, Window, Help) and a toolbar with icons for Consumers, Activities & Referrals, Rosters, Routes, Reports, Contracts, Unit Distribution, Invoices, and Payments. Below the toolbar, there are buttons for "New Call", "Call Log", and "Search for Services". The main window is divided into a left navigation pane and a right details pane. The navigation pane shows a tree structure with "Contents" expanded, listing "Summary", "Details", "Assessments", "Consumer Journal", and "Call History". The "Details" section is further divided into "General", "Contacts", "Locations (2)", "Phones", "User Fields (1)", and "Ethnic Races". The "General" section is currently selected, showing a form with various fields. The form includes a "Prefix" dropdown, "First Name" (Harold), "MI", "Last Name" (110 Bengston), "Suffix", "Maiden Name", "AKA Name", "Date Registered" (03/21/2008), "Consumer Details Last Reviewed" (03/21/2008), "Marital Status", "Gender" (Male), "Birth Date", "SSN", "Info Release Authorized" (No), "Default Agency" (Elder Services of Worcester Area, Inc.), "Area Code", and "Home Phone". Below these fields are expandable sections for "Residential Address", "Mailing Address", "NAPIS", "Status", "Insurance", "Other", and "Characteristics". The status bar at the bottom shows "SYSADMIN", "SAMS2K\_MA\_FIELDTEST", "4/15/2008", and "1:33 PM".

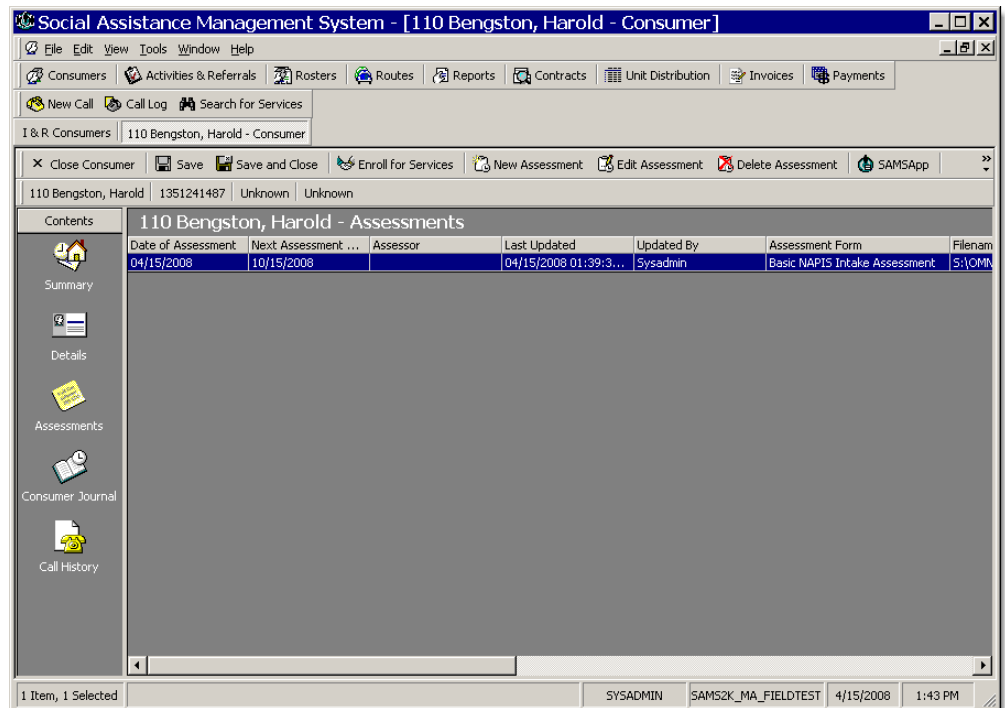
110 Bengston, Harold - Details	
Prefix	
First Name	Harold
MI	
Last Name	110 Bengston
Suffix	
Maiden Name	
AKA Name	
Date Registered	03/21/2008
Consumer Details Last Reviewed	03/21/2008
Marital Status	
Gender	Male
Birth Date	
SSN	
Info Release Authorized	No
Default Agency	Elder Services of Worcester Area, Inc.
Area Code	
Home Phone	
+ Residential Address	
+ Mailing Address	
+ NAPIS	
+ Status	
+ Insurance	
+ Other	
+ Characteristics	

## Consumer Assessments

Your user role must have permission to view, create, update, or delete assessments.

➤ *To view, add, modify, or delete assessments*

- 1 Access the appropriate consumer record as outlined in *I&R Consumer Summary Screen*.
- 2 Click **Assessments** in the consumer summary navigation pane.
- 3 View, add, modify, or delete assessments as outlined in the SAMS User's Guide or the SAMS Help files.
- 4 Click **Save** to save your changes and move to a different area of the record, or click **Save and Close** to close the record and return to the *I&R Consumer* list.





## Consumer Journal

Your user role must have permission to view, create, update, or delete a consumer journal. Additionally, journals are subject to organizational security - meaning that access may be limited by organization.

➤ *To view, add, modify, or delete consumer journal entries*

- 1 Access the appropriate consumer record as outlined in *I&R Consumer Summary Screen*.
- 2 Click **Consumer Journal** in the consumer summary navigation pane.
- 3 View, add, modify, or delete journal entries as outlined in the SAMS User's Guide or the SAMS Help files. Note that if your user role does not have permission to modify date and time fields, you will not be able to do that here.
- 4 Click **Save** to save your changes and move to a different area of the record, or click **Save and Close** to close the record and return to the *I&R Consumer* list.

The screenshot displays the SAMS application window titled "Social Assistance Management System - [110 Bengston, Harold - Consumer]". The interface includes a menu bar (File, Edit, View, Tools, Window, Help) and a toolbar with various icons for navigation and actions. A sidebar on the left contains a "Contents" pane with icons for Summary, Details, Assessments, Consumer Journal (selected), and Call History. The main area shows the "110 Bengston, Harold - Consumer Journal" with a table of entries.

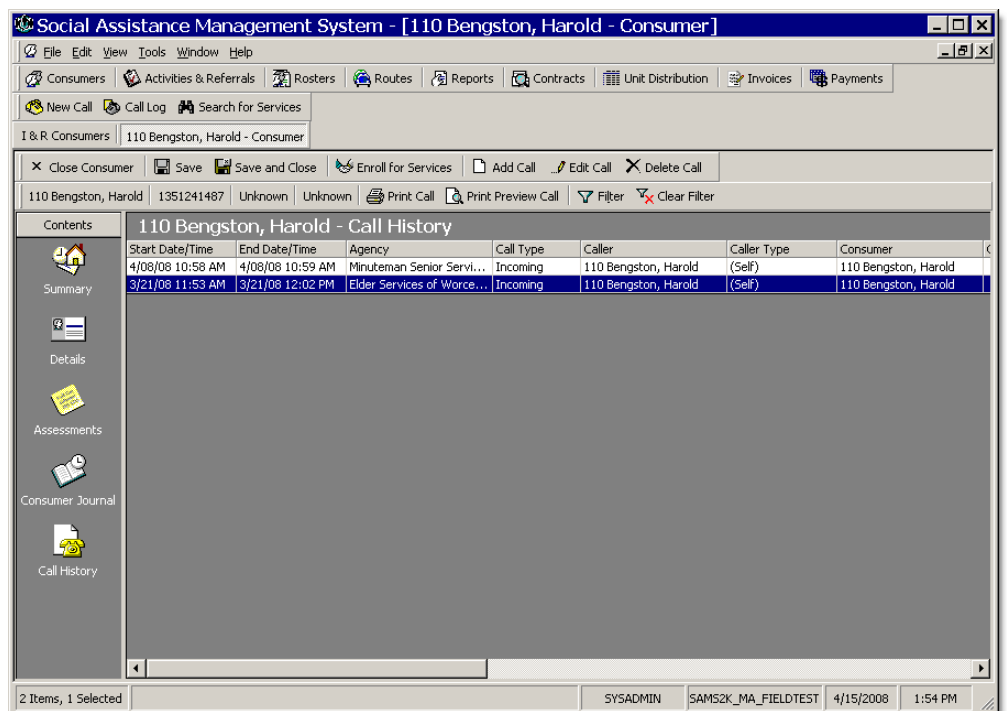
Entry Date	Entry Time	Journal Type	Subject	Create User
04/15/2008	01:47 PM	Progress Notes	Consumer Journal Sample	Account, Sysadmin

At the bottom of the window, a status bar indicates "1 Item, 1 Selected" and shows user information: SYSADMIN, SAMS2K\_MA\_FIELDTEST, 4/15/2008, 1:48 PM.

## Consumer Call History

You can add, view, modify, delete, and print calls from this *Call History* screen. The *Call History* screen displays calls similarly to the Call Log, however the *Call History* screen is consumer-specific.

Your user role must have permission to view, create, update, or delete a call history. Additionally, call history is subject to organizational security - meaning that access may be limited by organization.



### ➤ To add calls

- 1 Access the appropriate consumer record as outlined in *I&R Consumer Summary Screen*.
- 2 Click **Call History** in the consumer summary navigation pane.
- 3 Click **Add Call** on the toolbar.

-OR- Right-click in the *Call History* list and select **Add Call**. -OR- CTRL+N.

- 4 Add information as outlined in the *Call - Summary Screen* (on page 20) section.

- 5 Click **Save** to save your changes and move to a different area of the record, or click **Save and Close** to close the record and return to the *I&R Consumer* list.

➤ *To view or modify calls*

- 1 Access the appropriate consumer record as outlined in *I&R Consumer Summary Screen*.
- 2 Click **Call History** in the consumer summary navigation pane.
- 3 Double-click the call record you want to view or modify to open it.

---

-OR- Right-click a call record and select **Edit Call**. -OR- CTRL+O. -OR- Highlight the record and click **Edit Call** on the toolbar.

---
- 4 Edit the call as necessary. The process of editing call information is the same as adding call information. See the appropriate area of the ***Call - Summary Screen*** (on page 20) section for more information.
- 5 Click **Save** to save your changes and move to a different area of the record, or click **Save and Close** to close the record and return to the *I&R Consumer* list.

Create a filter to manage a large number of records. See the SAMS User's Guide or Help files for more information about filters.

➤ *To delete calls*


- 1 Access the appropriate consumer record as outlined in *I&R Consumer Summary Screen*.
- 2 Click **Call History** in the consumer summary navigation pane.
- 3 Highlight the record you want to delete and click **Delete Call** on the toolbar.

---

-OR- Right-click and select **Delete Call**. -OR- CTRL+D.

---
- 4 Click **Save** to save your changes and move to a different area of the record, or click **Save and Close** to close the record and return to the *I&R Consumer* list.

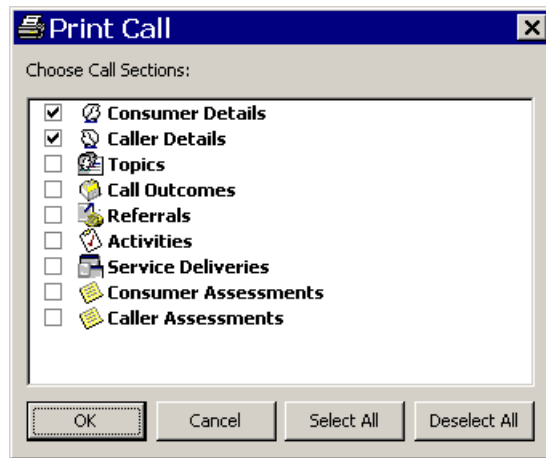
➤ *To print calls*

- 1 Access the appropriate consumer record as outlined in *I&R Consumer Summary Screen*.
- 2 Click **Call History** in the consumer summary navigation pane.
- 3 Highlight the record you want to print.
- 4 Click **Print Call**  on the toolbar.

---

-OR- Right-click and select **Print Call**. -OR- CTRL+P

---



- 5 Select the **Call Sections** you want to print.
- 6 Click **OK**.
- 7 If necessary, select a printer and click **Print**.
- 8 Click **Save** to save your changes and move to a different area of the record, or click **Save and Close** to close the record and return to the *I&R Consumer* list.

---

## Enrolling an I&R Consumer for Services

If you enroll an I&R Consumer for services, you are essentially converting the consumer from a SAMS I&R Consumer to a regular SAMS Consumer. This means that you can offer them the full range of SAMS services. Services specific to standard SAMS consumers include:

- Care Enrollments
- Co-Pays
- Consumer Care Managers
- Fund Identifiers
- Consumer Providers
- Caregivers and Care Recipients
- Service Suspensions
- Care Plans
- Service Orders

Once you enroll an I&R Consumer for services, they will no longer be visible in the *I&R Consumers* list. Instead, SAMS moves them to the regular *Consumers* list. This means that their security settings also default to the security settings in place at your agency for SAMS consumers.

You can enroll a consumer for services either from the *I&R Consumers* list or from within an *I&R Consumer* record. Both procedures are outlined below.

➤ ***To enroll a consumer for services from the consumer list***

- 1** Click **Consumers** on the toolbar.
- 2** From the *Type* filter, select **I&R Consumers**.
- 3** In the *I&R Consumers* list, find the appropriate record.
- 4** Highlight the record and click **Enroll for Services** on the toolbar.

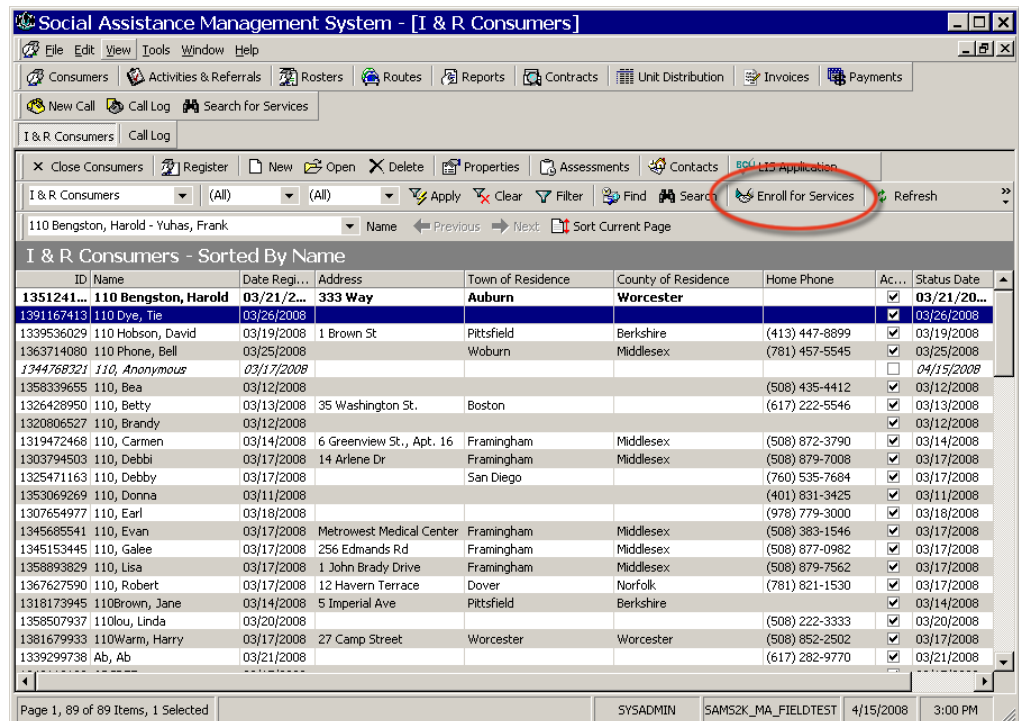
---

-OR- Right-click and select **Enroll for Services**. -OR- Select **Enroll for Services** from the **File** menu.

---

Use Filter, Find, or Search if necessary to locate a record. See the SAMS User's Guide or Help files to learn more about these features.

- 5 The I&R Consumer record appears in bold print. Click Refresh to update SAMS and move the record to the *Consumers* list.



➤ *To enroll a consumer for services from within an I&R consumer record*

- 1 Click Consumers on the toolbar.
- 2 From the *Type* filter, select I&R Consumers.
- 3 In the *I&R Consumers* list, find the appropriate record.
- 4 Double-click the record to open it.

-OR- Highlight the record and click **Open** on the toolbar. -OR- Right-click and select **Open I&R Consumer**. -OR- CTRL+O.

- 5 Click Enroll for Services on the toolbar.

-OR- Select Enroll for Services from the File menu.

- 6 SAMS updates the record. You'll notice that the consumer summary navigation pane now contains all the usual areas of a consumer record - Service Orders, Service Delivery, etc.

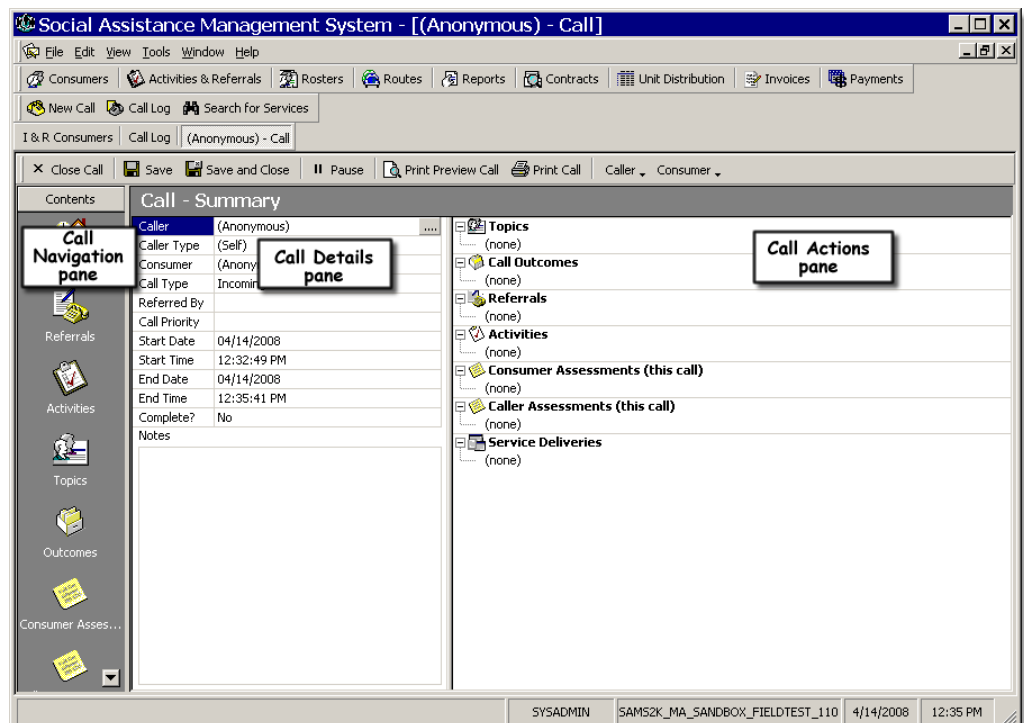
The screenshot displays the SAMS application window titled "Social Assistance Management System - [110 Bengston, Harold - Consumer]". The interface includes a menu bar (File, Edit, View, Tools, Window, Help) and a toolbar with icons for Consumers, Activities & Referrals, Rosters, Routes, Reports, Contracts, Unit Distribution, Invoices, and Payments. Below the toolbar, there are tabs for "I & R Consumers", "110 Bengston, Harold - Consumer", and "Call Log". A sub-toolbar contains buttons for "Close Consumer", "Save", "Save and Close", and "Enroll for Services", with the latter being circled in red. The main content area is titled "110 Bengston, Harold - Consumer Summary" and is divided into several sections: "Personal" (Client ID: 1351241487, SSN: Not Specified, Date of Birth / Age: Unknown / Unknown, Gender: Male, Marital Status: Not Specified, Language: English, Home Phone: Not Specified, Info Release Authorized: No, Date Registered: 03/21/2008, Consumer Details Last Reviewed: 03/21/2008, Active: Yes), "Residential Address" (333 Way, Auburn, MA 01501, County of Worcester), "Assessments" (Basic NAPIS Intake Assessment: 04/15/2008), and "Notes" (Caller needed SDC referred to NEDC). On the right side, there is a "NAPIS" section with fields for Ethnicity (Unknown), In Poverty (Don't Know), Lives Alone (Don't Know), High Nutritional Risk (Don't Know), Is Rural (No), Number of ADLs (Not Assessed), and Number of IADLs (Not Assessed). Below this is a "Consumer Journal" section with the note "(1 Journal Entry)". A left-hand navigation pane contains icons for Summary, Details, Assessments, Consumer Journal, and Call History. The bottom status bar shows "SYSADMIN", "SAMS2K\_MA\_FIELDTEST", "4/15/2008", and "2:53 PM".

# Call - Summary Screen

The *Call - Summary* screen provides you with a quick and easy way to manage a call from one screen. Organized similarly to SAMS' other screens, the menus, toolbars, and taskbar offer access to program data and features. The *Call - Summary* screen is divided into two panes - the call details pane and the call actions pane. The call details pane stores basic call information. The call actions pane contains headings that give you access to specific call areas where you can quickly view, add, and edit call actions.

The call navigation pane to the left of the screen displays the same headings as the call actions pane, with the exception of Service Deliveries. Use the call navigation pane as an alternative way to navigate and access different areas of a call record.

This section outlines how to enter calls using the call actions pane, as well as how to pause the call timer, print a call summary, and print mailing labels. See *Call Navigation Pane* (on page 48) for more information. Generally, it's faster to enter information using the call actions pane rather than the call navigation pane.





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## Call Taking Overview

This section outlines the general procedure for taking calls using SAMS I&R's *Call - Summary* screen. At first glance, this may look quite different than entering a call into the stand-alone version of BeaconIR, but you'll see that it's very similar once you get used to the new look!

From the *Call - Summary* screen, you can navigate to all the areas of a consumer call. Within this screen, you have the option of using either the headings that appear in the call actions pane, or of using the ***call navigation pane*** (on page 48). Generally, it's faster to use the call actions pane since you don't have to navigate away from the main *Call - Summary* screen, but you should use whatever method that feels most comfortable to you - both methods achieve the same results.

### About Call Records

SAMS I&R stores a consumer, caller, and consumer/caller relationship with each call record. The *Caller* is the person you are communicating with. The *Consumer* is the person who needs, may, or will receive services. *Caller Type* defines the nature of the caller's relationship to the consumer. Either the consumer or the caller can be anonymous.


### Types of Calls

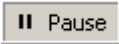
SAMS I&R can record many types of phone calls/communications, including:

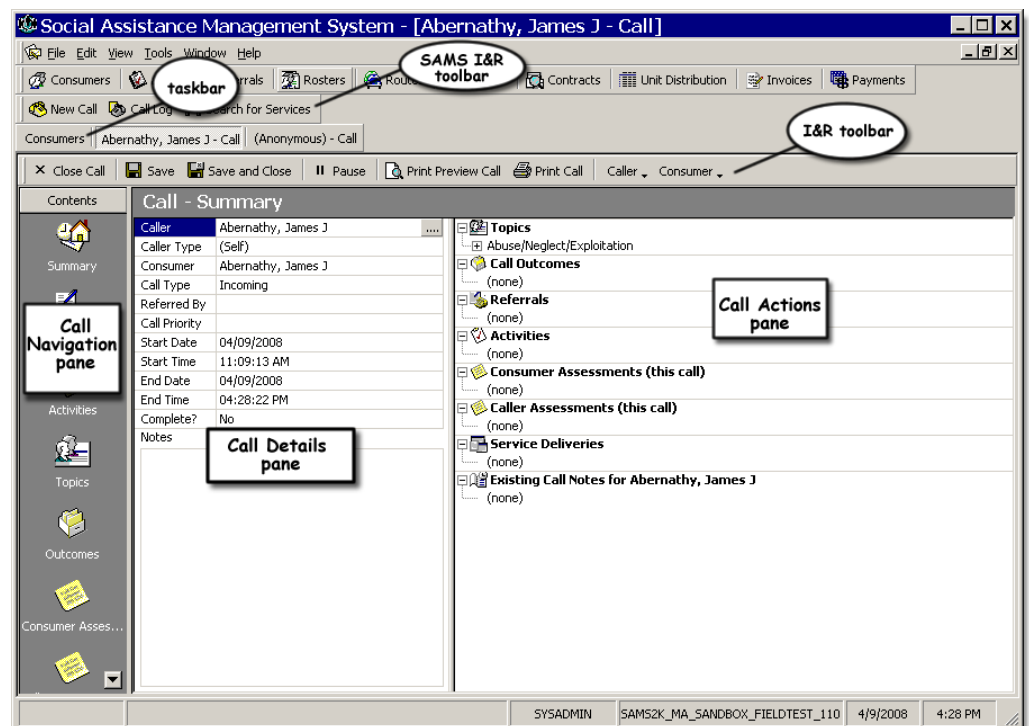
- Anonymous Caller about a named Consumer - an unknown caller phoning on behalf of an identified consumer.
- Consumer Call - a consumer phoning to obtain information for him or herself.
- Named Caller about a Named Consumer - an identified caller phoning on behalf of a known consumer or potential consumer.
- Named Caller about an Anonymous Consumer - an identified caller phoning about an anonymous consumer.
- Anonymous Call - neither the consumer nor the caller has been identified.

In SAMS I&R, *Anonymous* is the default option for both consumer and caller, making it easy to record these types of calls.

## General Call Taking Overview

Start by clicking **New Call**  on the SAMS I&R toolbar to start the call timer. Select a *Caller*, a *Consumer*, and a *Caller and Call Type* using the call details pane. Enter call **Topics** (on page 57), search for and create appropriate **Referrals** (on page 49), create *Caller* or *Consumer Assessments* (see "Assessments (Call - Summary Screen)" on page 36), add **Activities** (see "Entering Activities" on page 34), and record **Service Deliveries** (on page 39) using the call actions pane.

Click **Pause** (see "Pausing a Call" on page 42)  on the I&R toolbar to stop a call, or **Resume** to return to a stopped call. SAMS I&R keeps a running timer while the call is paused. You can keep the call open while you use other areas of SAMS by using the taskbar.



# Entering a New or Previously Taken Call


The process of entering a call is the same for both named and anonymous consumer/caller. Anonymous call information can only be stored within the call record, and will not be associated with any consumer/caller record.

You do not need to currently be taking a call to enter call records into SAMS I&R. The process of entering an old call is the same as taking a real-time call, except that you manually enter the call start and stop dates and times. However, If your user role does not have permission to modify a call in SAMS I&R, you will not be able to do this.

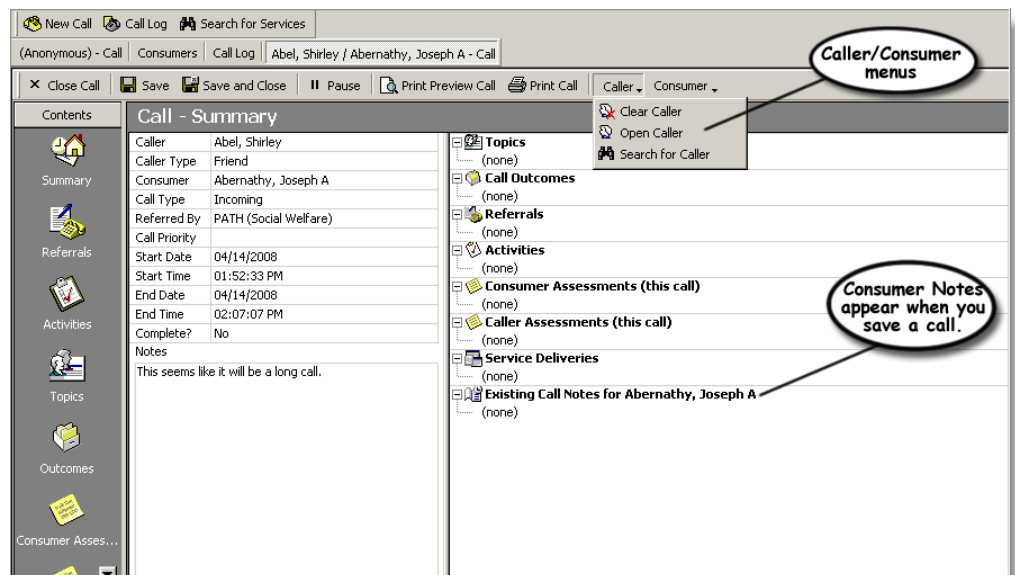
## ➤ To enter a call

- 1 Click New Call  on the toolbar.

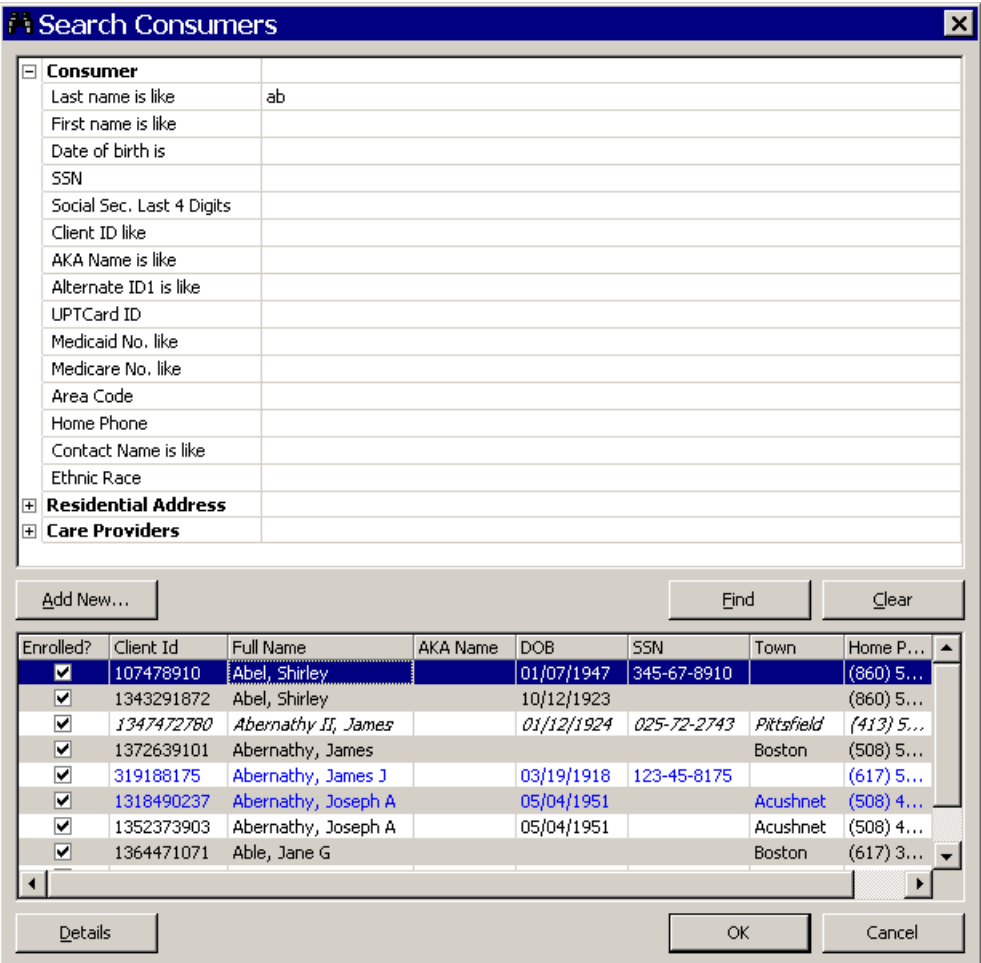
-OR- Right-click in the *Consumers* list and select New Call.

- 2 Click the Browse  button in the *Caller* row to add a name. Leave *Anonymous* as the default if no name is given.

-OR- Select Search for Caller from the Caller menu.



- 3 In the *Search Consumers* box that appears, enter the first few letters of the caller's last name.



**Search Consumers**

☐ **Consumer**

Last name is like: ab

First name is like:

Date of birth is:

SSN:

Social Sec. Last 4 Digits:

Client ID like:

AKA Name is like:

Alternate ID1 is like:

UPTCard ID:

Medicaid No. like:

Medicare No. like:

Area Code:

Home Phone:

Contact Name is like:

Ethnic Race:

☒ **Residential Address**

☒ **Care Providers**

Add New... Find Clear

Enrolled?	Client Id	Full Name	AKA Name	DOB	SSN	Town	Home P...
<input checked="" type="checkbox"/>	107478910	Abel, Shirley		01/07/1947	345-67-8910		(860) 5...
<input checked="" type="checkbox"/>	1343291872	Abel, Shirley		10/12/1923			(860) 5...
<input checked="" type="checkbox"/>	1347472780	Abernathy II, James		01/12/1924	025-72-2743	Pittsfield	(413) 5...
<input checked="" type="checkbox"/>	1372639101	Abernathy, James				Boston	(508) 5...
<input checked="" type="checkbox"/>	319188175	Abernathy, James J		03/19/1918	123-45-8175		(617) 5...
<input checked="" type="checkbox"/>	1318490237	Abernathy, Joseph A		05/04/1951		Acushnet	(508) 4...
<input checked="" type="checkbox"/>	1352373903	Abernathy, Joseph A		05/04/1951		Acushnet	(508) 4...
<input checked="" type="checkbox"/>	1364471071	Able, Jane G				Boston	(617) 3...

Details OK Cancel

- 4 Click Find.
- 5 If the caller's name appears in the search results pane at the bottom of the screen, highlight the appropriate record and click OK. Skip to step 7. If the caller's name does not appear, proceed to step 6.

- 6 If the caller does not appear in the search results pane, click **Add New**. In the *Register New I&R Consumer* box that appears, enter the caller's information as known and click OK. Note that your search criteria is automatically transferred into the *Register New I&R Consumer* dialog.

Details	
<b>Personal</b>	
Prefix	
First Name	
MI	
Last Name	Jenkins
Suffix	
Gender	
Birth Date	
SSN	
Area Code	
Home Phone	
Default Agency	
Date Registered	04/14/2008
<b>Residential Address</b>	
<b>Mailing Address</b>	
<b>NAPIS</b>	
<b>Characteristics</b>	

Use the Caller or Consumer buttons on the toolbar as necessary to clear a caller/consumer from the call record. The field reverts back to Anonymous.

- 7 Previous assessments associated with the caller appear in the call actions pane.
- 8 Use the Caller Type list to select the relationship of the caller to the consumer.
- 9 Repeat steps 1-8 to enter a *Consumer* and *Call Type*.
- 10 Continue using the lists to select *Referred By* and *Call Priority* as known.
- 11 SAMS automatically enters the *Start Date*, *Start Time*, *End Date* and *End Time*. You can edit these fields in the Call Log if your user role has permission to do so. See *Editing a Call* (on page 46) for more information.
- 12 Select Yes or No under call *Complete?*. Depending on your *I&R Settings* (see "Configuring I&R Settings" on page 4), this field may default to Yes or No, or SAMS may prompt you to make a selection when you save and close the call.

- 13** Enter any *Notes* as needed. When you access a saved call, any notes you entered for the consumer appear under the *Existing Call Notes* heading appears in the call actions pane for the consumer.



If you select multiple topics, SAMS I&R copies the same Time Spent, Outcome, and Comments to each record.

- 4 Enter the minutes spent for each topic in *Time Spent*.
- 5 In the *Outcome* column, use the *Outcome* list to select the topic action that resulted from the call, if possible.
- 6 Under *Plannings*, select the appropriate box under *Include?*.
- 7 Enter any *Comments* as needed.
- 8 When you are finished, click OK. The topics now appear in the *Call - Summary* screen. Double-click an individual topic to edit it as needed in the *Edit Call Topic* screen. To remove a topic, highlight it and press the DELETE key. Select Yes at the prompt.

Call - Summary	
Caller	(Anonymous)
Caller Type	Friend
Consumer	Abernathy, Joseph A
Call Type	Incoming
Referred By	PATH (Social Welfare)
Call Priority	
Start Date	04/14/2008
Start Time	01:52:33 PM
End Date	04/14/2008
End Time	02:27:45 PM
Complete?	No
Notes	This seems like it will be a long call.
Topics	<ul style="list-style-type: none"> <li>Adult Day</li> <li>VHAP</li> </ul>
Call Outcomes	(none)
Referrals	(none)
Activities	(none)
Consumer Assessments (this call)	(none)
Caller Assessments (this call)	(none)
Service Deliveries	(none)
Existing Call Notes for Abernathy, Joseph A	(none)



## Entering Call Outcomes

*Call Outcomes* refers to the actions that result from a phone call. For instance, a call may refer a consumer to Adult Protective Services or Private Long Term Care services. The *Agency Call Report* displays *Call Outcome* information.

Your user role must have permission to access, create, update, and delete outcomes.

➤ *To add a call outcome using the call - summary screen*

- 1 Begin a new call.

-OR- Access an existing call. See *Editing a Call* (on page 46).

- 2 Double-click the Call Outcomes heading in the call actions pane.

Include?	Outcome
<input type="checkbox"/>	Adult Protective Services
<input type="checkbox"/>	Brief or short-term services, follow-along, or ser
<input type="checkbox"/>	Emergency Services
<input type="checkbox"/>	Family Care Function Screen
<input type="checkbox"/>	Follow-Up Contact from RC - but not referred for s
<input type="checkbox"/>	Long Term Care Services/Resources/Information
<input type="checkbox"/>	Other Services/Resources/Information
<input type="checkbox"/>	Private Long Term Care Services
<input type="checkbox"/>	Public Funding: Medicare, medicaid, foodstamps, so
<input checked="" type="checkbox"/>	Services/Resources Other Than Emergency, APS, or L

Select All    Select None    OK    Cancel

- 3 Select the appropriate outcome(s).

- 4 Click OK. The call outcomes now appear in the *Call-Summary* screen. To edit/delete a call outcome, double-click it and change or deselect it in the *Edit Referral* screen. You can also delete a call outcome by highlighting it and pressing the DELETE key. Select Yes at the prompt.

Call - Summary	
Caller	(Anonymous)
Caller Type	Friend
Consumer	Abernathy, Joseph A
Call Type	Incoming
Referred By	PATH (Social Welfare)
Call Priority	
Start Date	04/14/2008
Start Time	01:52:33 PM
End Date	04/14/2008
End Time	02:45:27 PM
Complete?	No
Notes	This seems like it will be a long call.
Topics	<ul style="list-style-type: none"><li>Adult Day</li><li>VHAP</li><li><b>Call Outcomes</b> Services/Resources Other Than Emergency, APS, or L</li></ul>
Referrals	(none)
Activities	(none)
Consumer Assessments (this call)	(none)
Caller Assessments (this call)	(none)
Service Deliveries	(none)
Existing Call Notes for Abernathy, Joseph A	(none)

## Creating Referrals

Use **Referrals** to search for appropriate services and programs for consumers during the course of a phone call. Access **Referrals** through the call actions pane, the call navigation pane, or on the SAMS I&R toolbar. The **Search for Services** screen allows you to quickly locate referrals by using a variety of program, site, and/or service search terms.

You can also generate an activity from the **Search for Services** screen.

Your user role must have permission to view, create, update, or delete referrals. Additionally, the referrals area is subject to organizational security - meaning that access may be limited by organization.

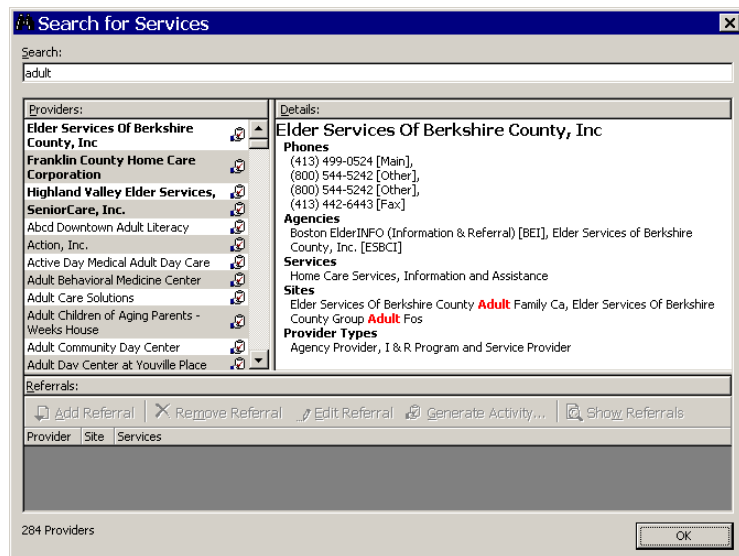
➤ *To create a referral using the call-summary screen*

- 1 Begin a new call.

-OR- Access an existing call. See **Editing a Call** (on page 46).


- 2 Double-click the Referrals heading.

- 3 In the **Search for Services** screen that appears, enter **Search:** criteria.

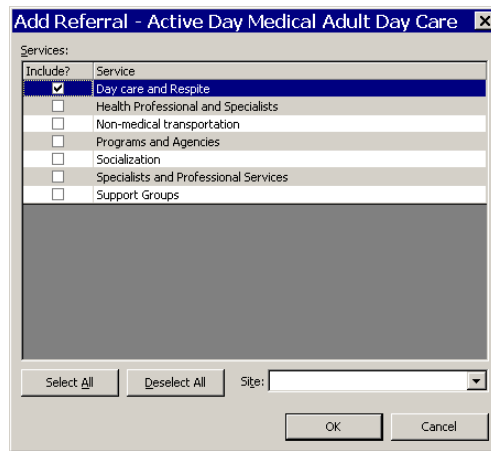


- 4 The **Providers:** column populates with matching criteria. Highlight a provider to populate the **Details:** pane with provider/service information.

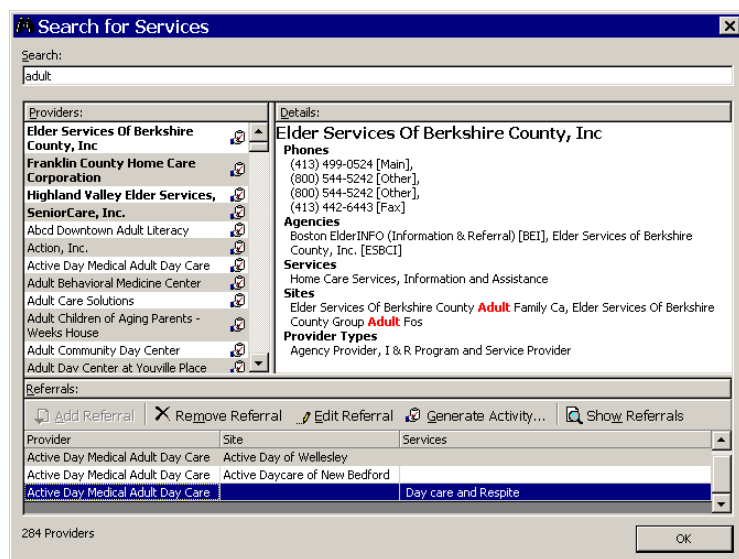
- 5 Once you find the appropriate provider/service, double-click it.

-OR- Highlight the provider/service and click **Add Referral**  in the **Referrals:** pane.

- 6 In the **Add Referral** screen that appears, select the appropriate service(s) by selecting the **Include?** box. You can also associate a site with the referral by using the **Site:** list.




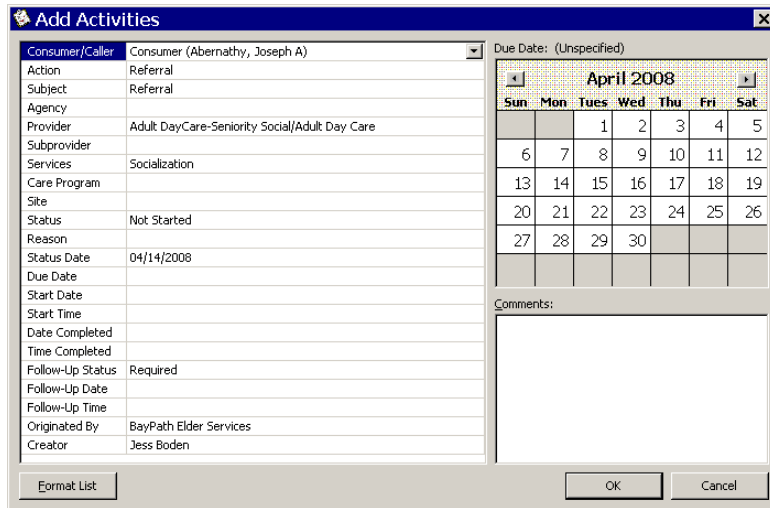
- 7 Click OK. Your selection(s) appears in the **Referrals:** pane. You can also click Cancel to close the **Add Referral** screen and search some more if you don't see the information you are looking for.



Use the **Show Referrals**

 button to view the details of an item highlighted in the **Referrals:** pane.

- 8 If you want to create an activity for a referral, highlight it in the **Referrals:** pane and click **Generate Activity...** . Add information as outlined in **Entering Activities** (on page 34) and click OK. The referral appears with a checkmark icon next to it in the **Referrals:** pane.



**Add Activities**

Consumer/Caller: Consumer (Abernathy, Joseph A)

Action: Referral

Subject: Referral

Agency: Adult DayCare-Seniority Social/Adult Day Care

Subprovider: Socialization

Care Program: Not Started

Site: 04/14/2008

Reason: 04/14/2008

Status Date: 04/14/2008

Due Date: 04/14/2008

Start Date: 04/14/2008

Start Time: 04/14/2008

Date Completed: 04/14/2008

Time Completed: 04/14/2008

Follow-Up Status: Required

Follow-Up Date: 04/14/2008

Follow-Up Time: 04/14/2008

Originated By: BayPath Elder Services

Creator: Jess Boden

Due Date: (Unspecified)

April 2008

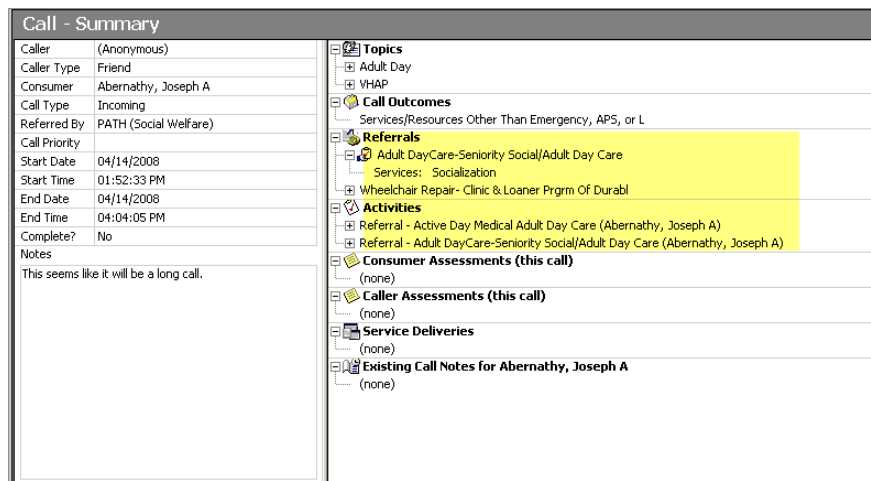
Sun	Mon	Tues	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Comments:

Format List OK Cancel

- 9 Click OK to remove the **Search for Services** screen from view.
- 10 The referral(s) now appear in the **Call - Summary** screen. If you added an activity with the referral, the referral appears with a checkmark icon next to it. Additionally, the activities appear under the **Activities** heading. To edit/delete a referral, double-click it and change or deselect it in the **Edit Referral** screen. You can also delete a referral by highlighting it and pressing the DELETE key. Select YES at the prompt.

Deleting a referral will not delete any activities you created with the referral. You must delete those separately, if necessary.



**Call - Summary**

Caller: (Anonymous)

Caller Type: Friend

Consumer: Abernathy, Joseph A

Call Type: Incoming

Referred By: PATH (Social Welfare)

Call Priority: 04/14/2008

Start Date: 01:52:33 PM

End Date: 04/14/2008

End Time: 04:04:05 PM

Complete?: No

Notes: This seems like it will be a long call.

**Topics**

- Adult Day
- VHAP

**Call Outcomes**

- Services/Resources Other Than Emergency, APS, or L

**Referrals**

- Adult DayCare-Seniority Social/Adult Day Care
- Services: Socialization
- Wheelchair Repair- Clinic & Loaner Prgrm Of Durabl

**Activities**

- Referral - Active Day Medical Adult Day Care (Abernathy, Joseph A)
- Referral - Adult DayCare-Seniority Social/Adult Day Care (Abernathy, Joseph A)

**Consumer Assessments (this call)**

- (none)

**Caller Assessments (this call)**

- (none)

**Service Deliveries**

- (none)

**Existing Call Notes for Abernathy, Joseph A**

- (none)

## Entering Activities

*Activities* are events that happen as a result of, or after, a call. For example, you could send out a brochure as a follow-up activity to a caller who inquired about a specific program.

You cannot create activities for anonymous consumers/callers. Additionally, *Activities* are subject to organizational privilege, which means your user role must have permission to create activities for an agency.

Your user role must have permission to view, create, update, or delete activities. Additionally, the activities area is subject to organizational security - meaning that access may be limited by organization.

➤ *To create an activity using the call - summary screen*

- 1 Begin a new call.

-OR- Access an existing call. See *Editing a Call* (on page 46).

- 2 Double-click the **Activities** heading.
- 3 Use the *Consumer/Caller* list to select either the **Consumer** or the **Caller**.

**Add Activities**

Consumer/Caller: Consumer (Abernathy, Joseph A)

Action: [dropdown]

Subject: [text box]

Agency: [text box]

Provider: [text box]

Subprovider: [text box]

Services: [text box]

Care Program: [text box]

Site: [text box]

Status: Not Started

Reason: [text box]

Status Date: 04/14/2008

Due Date: [text box]

Start Date: [text box]

Date Completed: [text box]

Time Completed: [text box]

Follow-Up Status: Not Required

Follow-Up Date: [text box]

Follow-Up Time: [text box]

Originated By: BayPath Elder Services

Creator: Jess Boden

Format List

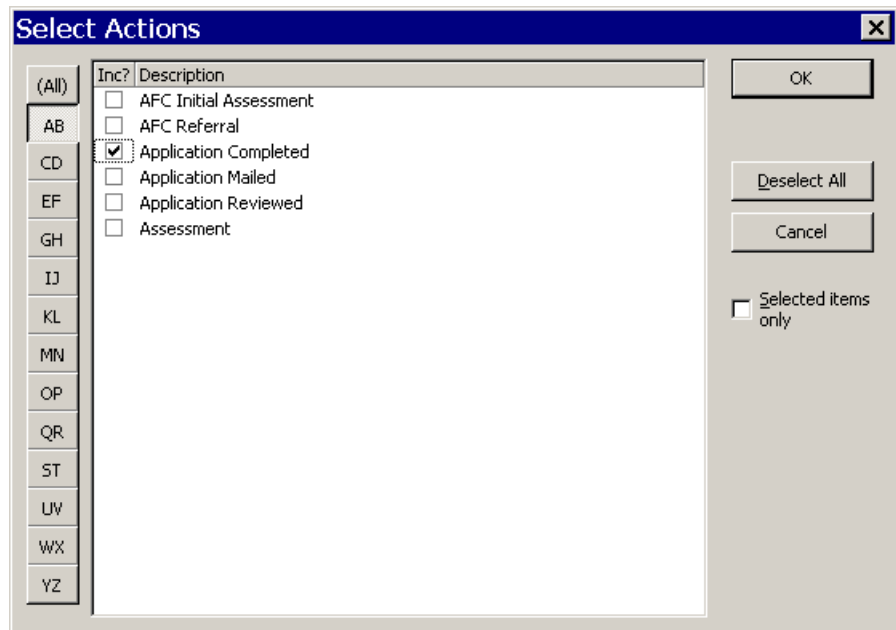
Due Date: (Unspecified)

Calendar: April 2008

Comments: [text area]

OK Cancel

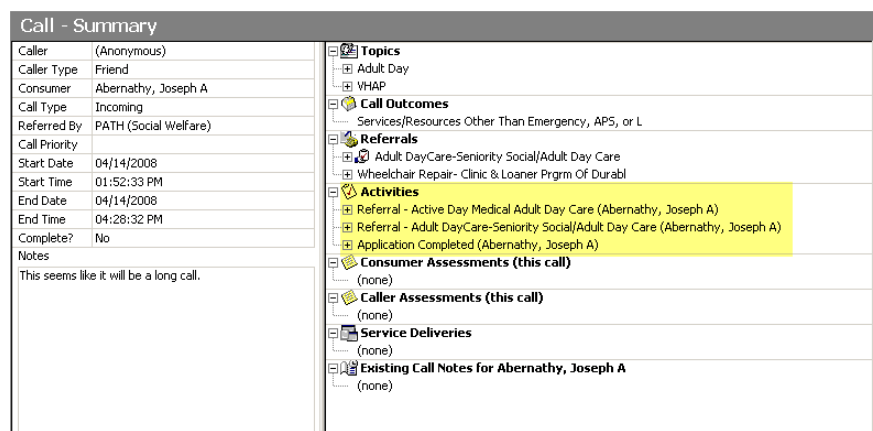
- 4 Select an *Action(s)* from the *Select Actions* screen and click OK.



The **Select Actions** dialog box features a vertical list of lettered tabs on the left: (All), AB, CD, EF, GH, IJ, KL, MN, OP, QR, ST, UV, WX, and YZ. The **CD** tab is currently selected. The main area contains a table with two columns: 'Inc?' and 'Description'. The table lists five actions: 'AFC Initial Assessment', 'AFC Referral', 'Application Completed' (which has a checked checkbox in the 'Inc?' column), 'Application Mailed', and 'Application Reviewed Assessment'. On the right side of the dialog, there are three buttons: 'OK', 'Deselect All', and 'Cancel'. Below these buttons is a checkbox labeled 'Selected items only'.

Inc?	Description
<input type="checkbox"/>	AFC Initial Assessment
<input type="checkbox"/>	AFC Referral
<input checked="" type="checkbox"/>	Application Completed
<input type="checkbox"/>	Application Mailed
<input type="checkbox"/>	Application Reviewed Assessment

- 5 Enter a *Subject*. Continue adding information as known or as needed, and click OK when finished.
- 6 The activity now appears in the *Call - Summary* screen. To edit an activity, double-click it and make any necessary changes in the *Edit Activities* screen. To delete an activity, highlight it and press the DELETE key. Select Yes at the prompt.



The **Call - Summary** screen is divided into two main sections. The left section contains a form with the following fields: Caller (Anonymous), Caller Type (Friend), Consumer (Abernathy, Joseph A), Call Type (Incoming), Referred By (PATH (Social Welfare)), Call Priority, Start Date (04/14/2008), Start Time (01:52:33 PM), End Date (04/14/2008), End Time (04:28:32 PM), Complete? (No), and Notes (This seems like it will be a long call.). The right section displays a hierarchical list of topics and activities. The 'Activities' section is expanded, showing three items: 'Referral - Active Day Medical Adult Day Care (Abernathy, Joseph A)', 'Referral - Adult DayCare-Seniority Social/Adult Day Care (Abernathy, Joseph A)', and 'Application Completed (Abernathy, Joseph A)'. The 'Application Completed' item is highlighted in yellow. Other sections include 'Topics' (Adult Day, VHAP), 'Call Outcomes' (Services/Resources Other Than Emergency, APS, or L), 'Referrals' (Adult DayCare-Seniority Social/Adult Day Care, Wheelchair Repair- Clinic & Loaner Prgrm Of Durabl), 'Consumer Assessments (this call)' (none), 'Caller Assessments (this call)' (none), 'Service Deliveries' (none), and 'Existing Call Notes for Abernathy, Joseph A' (none).

---

## Assessments (Call - Summary Screen)

*Assessments* allow you to make informed decisions when making referrals to consumers/callers. Both *Consumer* and *Caller Assessments* store consumer assessment sessions based on forms provided with SAMS and Omnia applications. You can use the program to create new assessments for both named and anonymous consumers/callers. Record an assessment from within a call or from within a consumer/caller record.

When you record an assessment for a named consumer/caller, the assessment can be retrieved from both the *Call Log* and the consumer/caller record. Access assessments for a current caller using the *Call Summary* screen, or for an existing caller through the *I&R Consumer Summary* screen.

In the instance of an anonymous consumer, the assessment you complete will be associated with the call - not an actual person. If both the caller and consumer are anonymous, SAMS I&R only provides you with the option to add a consumer assessment, so that the anonymous caller essentially becomes both the caller and the consumer in the stored call record.

Remember that the goal of an assessment is to be able to gather enough information to make informed referrals for a consumer. With this in mind, even if the caller is named and the consumer is anonymous, you'll want to run an anonymous consumer assessment.

Your user role must have permission to view, create, update, or delete assessments. Additionally, the assessments area is subject to organizational security - meaning that access may be limited by organization.

➤ *To record an assessment for a consumer/caller*

- 1 Begin a new call.

---

-OR- Access an existing call. See *Editing a Call* (on page 46).

---



2 Double-click Consumer or Caller Assessments.

**New Assessment**

Details:

☐ **Assessment Form**

Filename	S:\OMNIA\ASSESSMENT FORMS\2008 - Ho
Name	Financial Assessment
Author	Jeff Benjamin
Last Updated	12/18/2007 2:42:25 PM
Version	1.0.3

☐ **Organization**

Care Program	
Agency	BayPath Elder Services
Provider	BayPath Elder Services
Subprovider	
Site	

☐ **Assessment**

Date of Assessment	04/14/2008
Next Assessment Date	10/14/2008
Assessor	
Password	
Verify Password	

Comments

OK Cancel

- 3 Use the *Filename* list to select the appropriate assessment form for this consumer. If there are no forms available, select [Browse..].
- 4 Enter your name in Assessor. You can choose to password protect this assessment by entering a Password and then entering it again in *Verify Password*. SAMS I&R automatically enters the *Date of Assessment* and *Next Assessment Date* using today's date and the *Reassessment Date* default.
- 5 Click OK.
- 6 SAMS may prompt you that your assessment contains indicators that need to be saved. If the prompt appears, click Yes to continue.

- 7 Enter data into the assessment as outlined in the SAMS User's Guide or Help files. Access the Help files by selecting Search from the Help menu and entering the appropriate terms.

A.1. APPLICANT INFORMATION	
a.1. Applicant's Last Name?	Abernathy
a.2. Applicant's First Name?	Joseph
a.3. Applicant's Middle Initial?	A
b. Applicant's Date of Birth	05/04/1951
c. Address	7 LOCKSLEY ST
d. City/Town	Acushnet
e. Does the Applicant have a Spouse?	Yes
f. If Yes, is the spouse also an applicant?	
g. Spouse's Name	
h. Spouse's Date of Birth	

- 8 When finished, click Save and Close.
- 9 The assessment now appears in the *Call - Summary* screen. To edit an assessment, double-click it and make any changes necessary. To delete an assessment, highlight it and press the DELETE key. Select Yes at the prompt.

Call - Summary	
Caller	(Anonymous)
Caller Type	Friend
Consumer	Abernathy, Joseph A
Call Type	Incoming
Referred By	PATH (Social Welfare)
Call Priority	
Start Date	04/14/2008
Start Time	01:52:33 PM
End Date	04/14/2008
End Time	04:46:35 PM
Complete?	No
Notes	This seems like it will be a long call.

Topics	
Adult Day	
VHAP	
Call Outcomes	Services/Resources Other Than Emergency, APS, or L
Referrals	<ul style="list-style-type: none"> <li>Adult DayCare-Seniority Social/Adult Day Care</li> <li>Wheelchair Repair- Clinic &amp; Loaner Prgrm Of Durabl</li> </ul>
Activities	<ul style="list-style-type: none"> <li>Referral - Active Day Medical Adult Day Care (Abernathy, Joseph A)</li> <li>Referral - Adult DayCare-Seniority Social/Adult Day Care (Abernathy, Joseph A)</li> <li>Application Completed (Abernathy, Joseph A)</li> </ul>
Consumer Assessments (this call)	<ul style="list-style-type: none"> <li>Home Care Program Financial Assessment - 2008 - 04/14/2008</li> <li>Basic NAPIS Intake Assessment - 04/14/2008</li> </ul>
Caller Assessments (this call)	(none)
Service Deliveries	(none)
Existing Call Notes for Abernathy, Joseph A	(none)

## Service Deliveries

Service Delivery Templates can be used to save different types of service deliveries when saving a call record. You can save services to a consumer, or to a consumer group. The ability to customize how services are recorded in the context of a call is available under ***I&R Settings*** (see "Configuring I&R Settings" on page 4) in the **Options** menu.

For more information about service templates, including how to add a service template, see the SAMS User's Guide or the SAMS **Help** files. To access the **Help** files, select **Search** from the **Help** menu and enter 'Service Delivery Templates' as the search term.

Your user role must have permission to view, create, update, or delete service deliveries. Additionally, service deliveries are subject to organizational security - meaning that access may be limited by organization.

➤ **To add a service delivery to the call - summary screen**

- 1 Begin a new call.

-OR- Access an existing call. See ***Editing a Call*** (on page 46).

- 2 Double-click the Service Deliveries heading.

Inc?	Description	Care Program	Service	Agency
<input checked="" type="checkbox"/>	BayPath Elder Services - Information and Assistance (Beacon Consumer Group)	NAPIS - Title III	Information and Assistance	BayPa

Buttons: Edit, Delete, Service Date: 04/14/2008, Units: 1.00, OK, Cancel. Also: ☒ Auto-Enroll...

- 3 Select the **Inc?** box next to the template you want to include in the **Record Service Deliveries** screen.

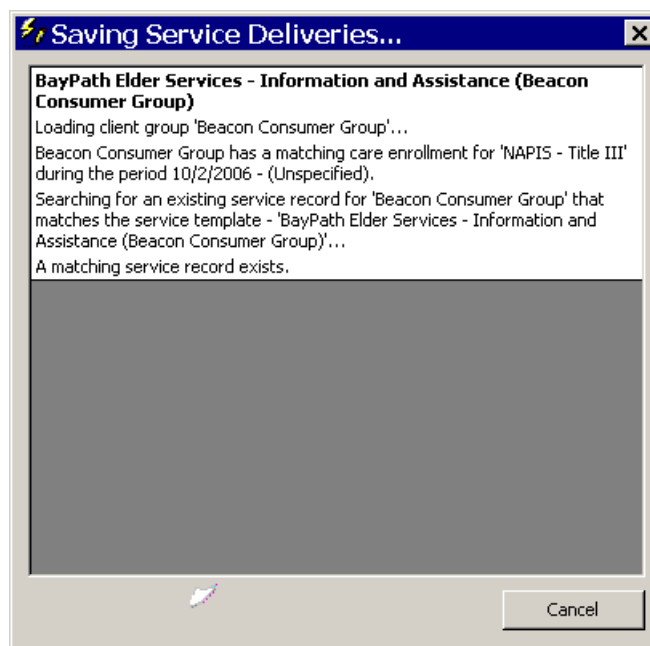
- 4 If the **Filter list to consumer's enrollments** box is selected, the *Record Service Deliveries* screen shows **ONLY** those enrollments in which the consumer is currently enrolled. Check this box if you do not want to create any new consumer enrollments.

---

-OR- To automatically enroll the consumer for services that they are not enrolled in, leave the **Filter list to consumer's enrollments** box unselected and check the **Auto-Enroll** box. Select **Yes** at the prompt. This automatically creates/updates the consumer's enrollment record so that the selected services can be delivered.

---

- 5 Modify the *Service Date* and the number of *Units*, if necessary.
- 6 Click **OK**. Wait as your service deliveries are recorded.



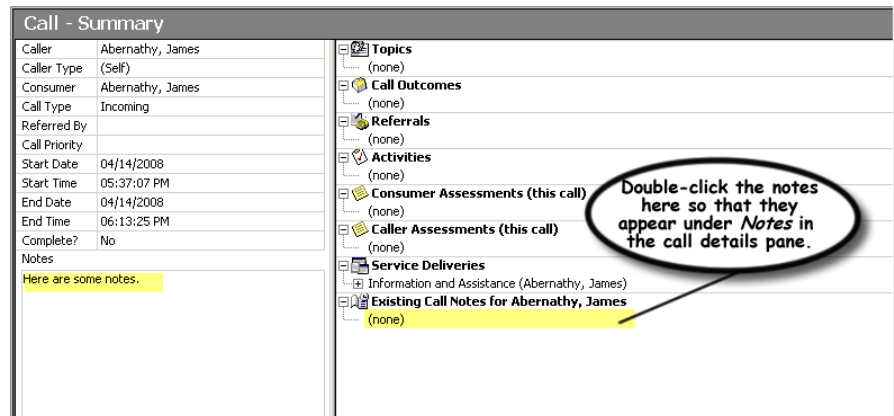
- 7 Your service deliveries now appear in the *Call - Summary* screen. To edit a service delivery, double-click it and make any necessary changes in the *Service Delivery* screen. Click **Save and Close** when you are done. To delete a service delivery, highlight it and press the **DELETE** key. Select **Yes** at the prompt.

## Editing or Deleting Existing Call Notes

When a user enters notes into the call details pane for a consumer, they are saved with the call. Later, when you access a saved call, the notes appear under the *Existing Call Notes...* heading.

➤ *To edit existing call notes*

- 1 Access a previously entered call. See ***Editing a Call*** (on page 46) for more information.
- 2 If there are existing notes for the consumer, they appear under the *Existing Call Notes...* heading in the call actions pane.
- 3 Double-click the notes. They appear under the *Notes* section in the call details pane.
- 4 Edit or delete the notes.
- 5 Save or Save and Close the call.

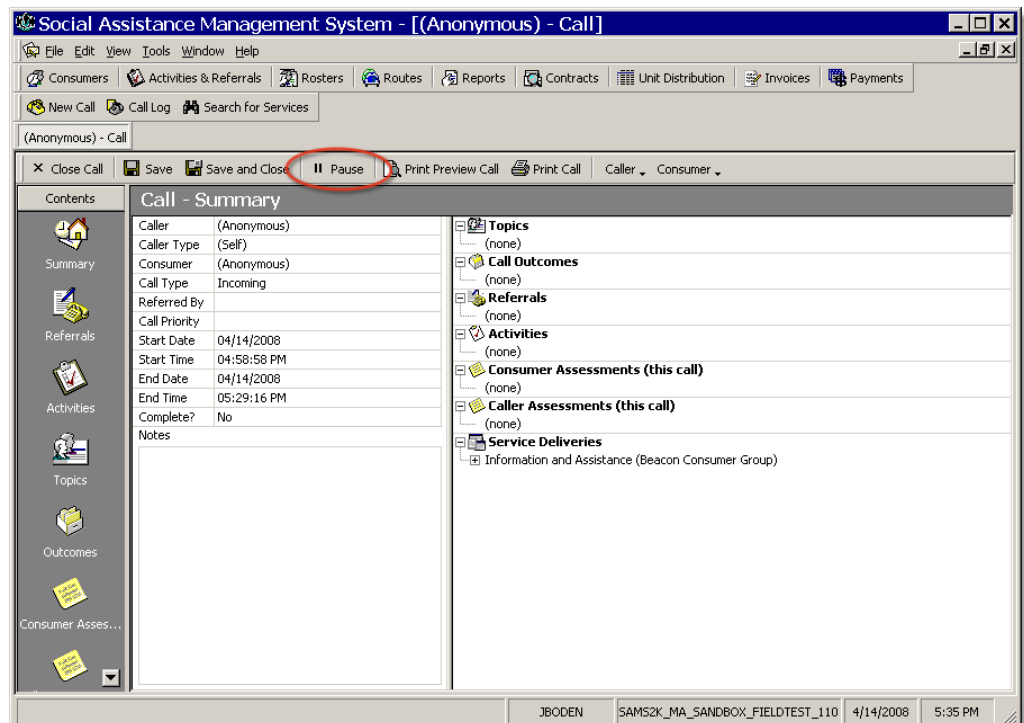



## Pausing a Call

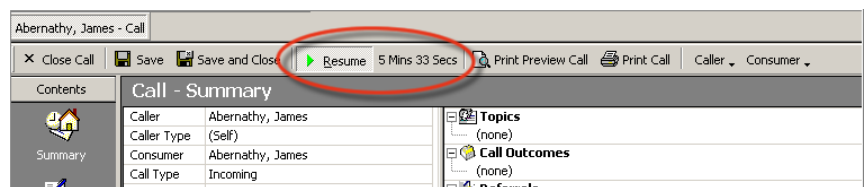
You can pause a call if necessary. The I&R toolbar keeps a running record of the number of seconds for which the call has been paused. You can only pause new calls.


➤ *To pause the call timer*

- 1 Start a new call.



- 2 Click Pause  on the toolbar. It switches to Resume and a call timer appears.



- 3 Click Resume  when you are ready to resume the call timing.

---

## Printing a Call Summary

To preview the call summary before printing, click **Preview Call** in step 2. SAMS I&R can prompt you after every call to print a call summary. See *Configuring I&R Settings* (on page 4) for more information.

➤ *To print a call summary*

- 1 Begin a new call.

---

-OR- Access an existing call. See *Editing a Call* (on page 46).

---

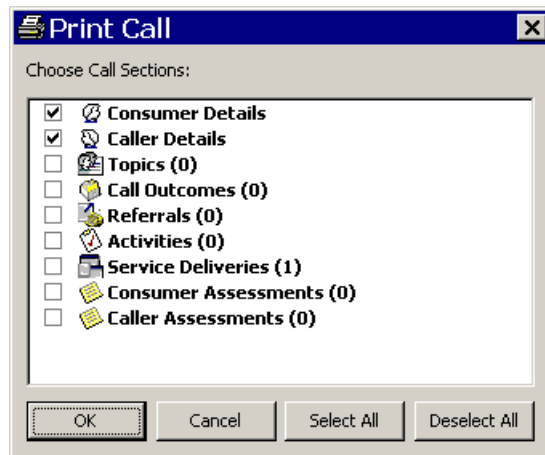
- 2 Click **Print Call**  on the toolbar.

---

-OR- From the **File** menu, select **Print**.

---

- 3 In the *Print Call* screen, select the Call Sections you would like to print. The *Print Call* screen defaults to the Call Sections you selected last.



- 4 Click **OK**.
- 5 If necessary, select a printer and click **Print**.

# Using the Call Log

SAMS I&R stores call records in a *Call Log*. Use the call log to edit or delete previously entered calls. The call log can also print summaries of individual calls.

You change the different sections of a call record (topics, referrals, etc) using the same procedures as when the call was entered. See *Call Taking Overview* (on page 21) for more information.

You can customize the *Call Log* view just as you can any other list screen in SAMS, to include adding and removing columns. See the SAMS User's Guide or the SAMS Help files for more information about customizing the screen. To access the Help files, select Search from the Help menu and enter the appropriate search terms - e.g. 'sorting pages.'

Your user role must have permission to view, create, update, or delete a call history in order to use the call log. Additionally, the call log is subject to organizational security - meaning that access may be limited by organization.

**Page Navigation Toolbar**

Call Log - Sorted By Date Created

Start Date/Time	End Date/Time	Agency	Call Type	Caller	Caller Type	Consumer	Comple...	Referr
4/14/08 5:37 PM	4/14/08 5:52 PM	BayPath Elder Services	Incoming	Abernathy, James	(Self)	Abernathy, James	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4/14/08 4:58 PM	4/14/08 4:59 PM	BayPath Elder Services	Incoming	(Anonymous)	(Self)	(Anonymous)	<input type="checkbox"/>	<input type="checkbox"/>
4/14/08 1:52 PM	4/14/08 1:56 PM	BayPath Elder Services	Incoming	Abel, Shirley	Friend	Abernathy, Joseph A	<input type="checkbox"/>	<input type="checkbox"/>
4/14/08 1:09 PM	4/14/08 1:21 PM	BayPath Elder Services	Incoming	(Anonymous)	(Self)	(Anonymous)	<input type="checkbox"/>	<input type="checkbox"/>
4/14/08 1:05 PM	4/14/08 1:06 PM	BayPath Elder Services	Incoming	Abel, Shirley	(Self)	Abel, Shirley	<input type="checkbox"/>	<input type="checkbox"/>
4/14/08 1:05 PM	4/14/08 1:05 PM	BayPath Elder Services	Incoming	(Anonymous)	(Self)	(Anonymous)	<input type="checkbox"/>	<input type="checkbox"/>

Page 1, 6 of 6 Items, 1 Selected

JBODEN SAMS2K\_MA\_SANDBOX\_FIELDTEST\_110 4/14/2008 6:18 PM



## Finding a Call in the Log

You may need to find a particular call in the log to modify a note or to edit an activity. SAMS I&R gives you the ability to search for a call record in many different ways: by call details, date, consumer, and organization.

You can also click the title of a column to have SAMS re-sort the call records by the information found in that column. For instance, clicking the *Caller* title will sort all the records alphabetically by caller name.

### ➤ To use the call filter

- 1 Click **Call Log** on the SAMS I&R toolbar.
- 2 Click **Filter** on the toolbar.

Filter calls by the following criteria:	
<input checked="" type="checkbox"/> <b>Filter By</b>	
Match Type	All of the criteria
<input checked="" type="checkbox"/> <b>Call</b>	
Call Type	Incoming
Caller Type	Friend
Priority	
Referred By	
Complete?	
Referral Made?	
Create User Name Like	
Update User Name Like	
<input checked="" type="checkbox"/> <b>Call Date</b>	
Date	Date Created
On Or After	
On Or Before	
<input checked="" type="checkbox"/> <b>Consumer</b>	
Consumer Name Like	ab
Consumer Type	
Caller Name Like	
Caller Type	
<input checked="" type="checkbox"/> <b>Organization</b>	
State Unit	
Agency	

Click **Clear All** to remove information from all the fields.

- 3 Enter information in as many fields as necessary. If your search is turning up no or only a small number of records, try creating broader search filters.
- 4 Click **OK**.
- 5 SAMS I&R filters the *Call Log* list so that it displays only those records that meet your filter criteria.

---

## Editing a Call

➤ *To edit a call in the call log*

- 1 Click Call Log on the SAMS I&R toolbar.
- 2 Find and highlight the appropriate record in the *Call Log* screen - see *Finding a Call in the Log* (on page 45).

- 3 Click Open Call  on the toolbar.

---

-OR- Right-click and chose Open Call.... -OR- CTRL+O. -OR- Double-click it.

---

- 4 Enter or modify information about the call as outlined in *Call Taking Overview* (on page 21).
- 5 When finished, Save and Close the call.
- 6 To close the *Call Log*, click Close Call Log on the toolbar.

---

-OR- From the File menu, select Close Call Log.

---

---

## Removing a Call

➤ *To remove a call from the call log*

- 1 Click Call Log on the SAMS I&R toolbar..
- 2 Find and highlight the appropriate record in the *Call Log* screen - see *Finding a Call in the Log* (on page 45).
- 3 Click Delete Call on the toolbar.

---

-OR- Right-click and select Delete Call. -OR- CTRL+D.

---


- 4 At the prompt, click Yes to confirm or No to cancel.

---

## Printing from the Call Log

➤ *To print a call summary from the call log*

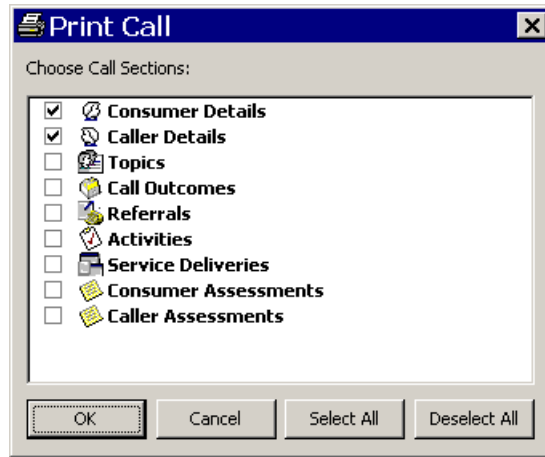
- 1 Click Call Log on the SAMS I&R toolbar.
- 2 Find and highlight the appropriate record in the *Call Log* screen - see *Finding a Call in the Log* (on page 45).

- 3 Highlight the appropriate record or records. Hold down the CTRL (control) key when selecting to choose multiple records.
- 4 Click Print Call  on the toolbar.

---

-OR- Right-click and select Print Call. -OR- CTRL+P.

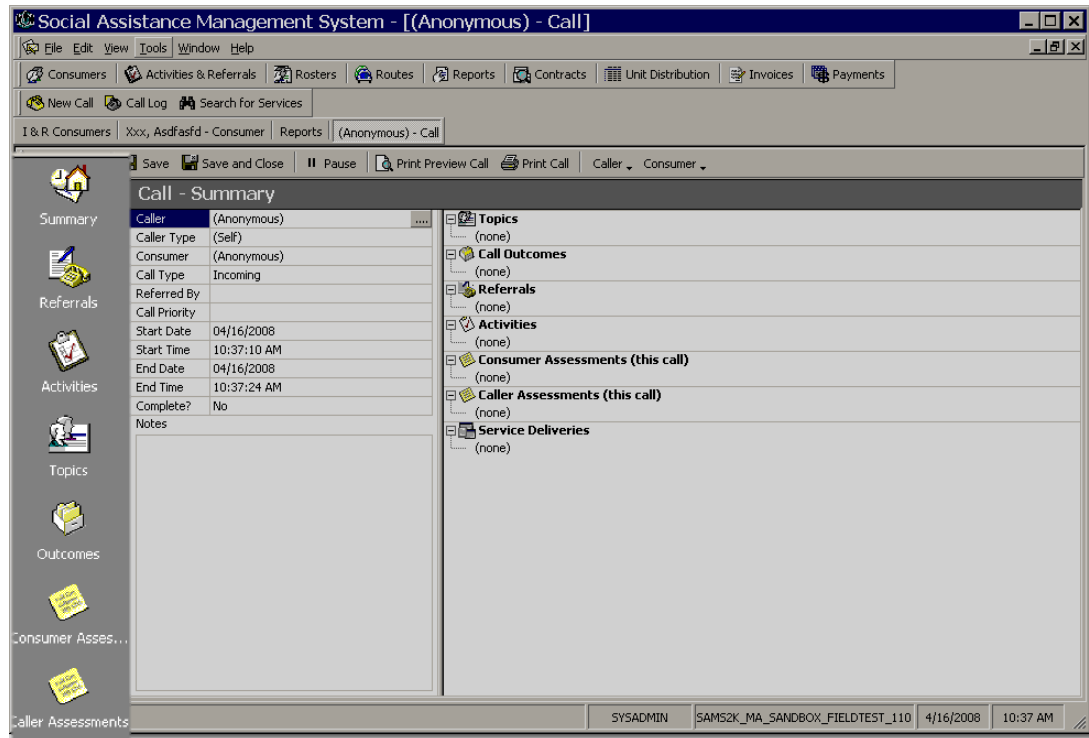
---



- 5 Select the Call Sections you want to print.
- 6 Click OK.
- 7 If necessary, select a printer and click Print.

# Call Navigation Pane

The *Call - Summary Screen* (on page 20) section describes how to navigate a call from that screen. However, as we touched upon in that section, you can access most of the same areas to the left of the *Call - Summary* screen in the call navigation pane. This section takes you through entering call information using the call navigation pane. We suggest using the call actions pane for maximum efficiency, though, as using the call navigation pane requires extra steps.

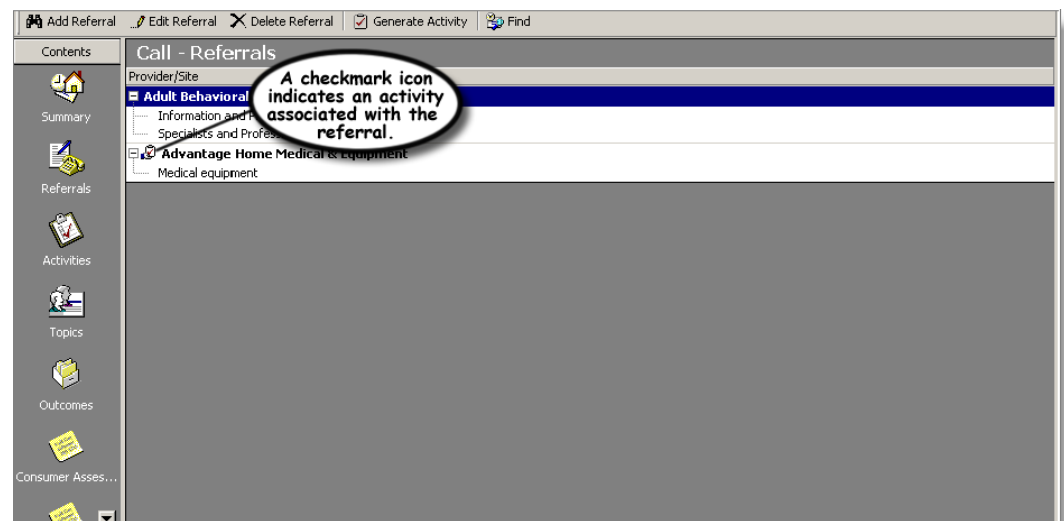


# Referrals

This section looks at creating, editing, and deleting a referral from the *Call - Referrals* screen. You can also add *Activities* (see "Entering Activities" on page 34) from a referral.

Use *Referrals* to search for appropriate services and programs for consumers during the course of a phone call. Referrals can also be added in the *Call - Summary Screen* (on page 20) call actions pane and on the SAMS I&R toolbar.

Your user role must have permission to view, create, update, or delete referrals. Additionally, the referrals area is subject to organizational security - meaning that access may be limited by organization.



➤ *To add a referral in call - referrals screen*

- 1 Begin a new call.

---

-OR- Access an existing call. See *Editing a Call* (on page 46).

---

- 2 Click Referrals in the call navigation pane.

- 3 Click Add Referral on the toolbar


---

-OR- Right-click and select Add Referral. -OR- Select Add Referral from the File menu. -OR- CTRL+N.

---

- 4 In the *Search for Services* screen that appears, just enter *Search:* words. SAMS automatically begins loading appropriate referrals.

- 5 The *Providers:* column populates with matching criteria. Highlight a provider to populate the *Details:* pane with provider/service information.
- 6 Once you find the appropriate provider/service, double-click it.

-OR- Highlight the provider/service and click **Add Referral**  in the *Referrals:* pane.


- 7 In the *Add Referral* screen that appears, select the appropriate service(s) by selecting the *Include?* box. You can also associate a site with the referral by using the *Site:* list.

- 8 Click OK. Your selection(s) appears in the *Referrals:* pane. You can also click Cancel to close the *Add Referral* screen and search some more if you don't see the information you are looking for.

Use the **Show Referrals**



button to view the details of an item highlighted in the *Referrals:* pane.

- 9 If you want to create an activity for a referral, highlight it in the *Referrals:* pane and click **Generate Activity...** . Add information as outlined in *Entering Activities* (on page 34) and click OK. The referral appears with a checkmark icon next to it in the *Referrals:* pane. To create activities, your user role must have permission to do so.

You can also add an activity for the referral later by clicking **Generate Activity** on the toolbar.

- 10 Click OK to remove the *Search for Services* screen from view.

- 11** The referral(s) now appear in the *Call - Referrals* screen. If you added an activity with the referral, the referral appears with a checkmark icon next to it. Additionally, the activities appear in the *Activities* area.

---

Deleting a referral will not delete any activities you created with the referral. You must delete those separately, if necessary.

---

➤ *To edit a referral in the call - referrals screen*

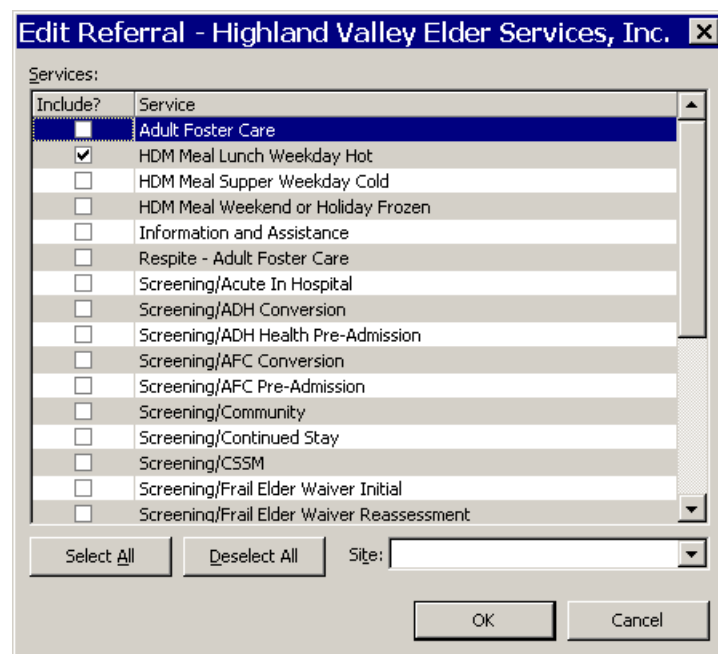
- 1** Access an existing call. See *Editing a Call* (on page 46).
- 2** Click **Referrals** in the call navigation pane.
- 3** Highlight the referral you want to change and click **Edit** on the toolbar.

---

-OR- Select **Edit** from the **File** menu. -OR- CTRL+O.

---

- 4** In the *Edit Referral* screen, select a new *Service*. You can also deselect the service without choosing another. Modify the *Site*, if necessary.



- 5** Click **OK**.



➤ *To remove a referral in the call - referrals screen*

- 1 Access an existing call.
- 2 Click Referrals in the call navigation pane.
- 3 Highlight the referral you want to change and click Delete Referral on the toolbar.

---

-OR- Right-click and select Delete Referral. -OR- CTRL+D.

---

- 4 Select Yes at the prompt.

## Activities

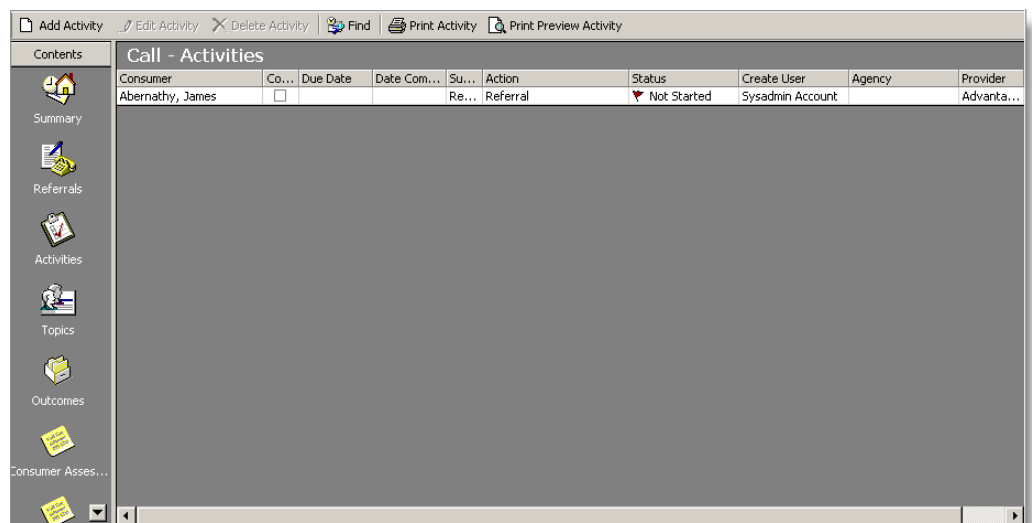
*Activities* are events that happen as a result of, or after, a call. For example, you could send out a brochure as a follow-up activity to a caller who inquired about a specific program.

Activities can also be generated from *Referrals* (see "Creating Referrals" on page 30).

You cannot create activities for anonymous consumers/callers. Additionally, *Activities* are subject to organizational privilege, which means your user role must have permission to create activities for an agency.

This section looks at adding, editing, and deleting activities from the *Call - Activities* screen.

Your user role must have permission to view, create, update, or delete activities. Additionally, the activities area is subject to organizational security - meaning that access may be limited by organization.



### ➤ To add an activity from the call - activities screen

- 1 Begin a new call.

---

-OR- Access an existing call. See *Editing a Call* (on page 46).

---

- 2 Click **Activities** in the call navigation pane.

**3** Click **Add Activity** on the toolbar

-OR- Right-click and select **Add Activity**. -OR- Select **Add Activity** from the **File** menu.-OR- CTRL+N.

**4** Use the *Consumer/Caller* list to select either the **Consumer** or the **Caller**.

**Add Activities**

Consumer/Caller: Consumer (Abernathy, Joseph A)

Due Date: (Unspecified)

Calendar: April 2008

Sun	Mon	Tues	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Comments:

Format List OK Cancel

**5** Select an *Action(s)* from the *Select Actions* screen and click **OK**.

**Select Actions**

(All) AB CD EF GH IJ KL MN OP QR ST UW WX YZ

Inc?	Description
<input type="checkbox"/>	AFC Initial Assessment
<input type="checkbox"/>	AFC Referral
<input checked="" type="checkbox"/>	Application Completed
<input type="checkbox"/>	Application Mailed
<input type="checkbox"/>	Application Reviewed
<input type="checkbox"/>	Assessment

OK Deselect All Cancel

☐ Selected items only

**6** Enter a *Subject*. Continue adding information as known or as needed, and click **OK** when finished.

➤ *To edit an activity in the call - activities screen*

- 1 Access an existing call. See *Editing a Call* (on page 46).
- 2 Click **Activities** in the call navigation pane.
- 3 Highlight the activity you want to change and click **Edit Activity** on the toolbar

---

-OR- Right-click and select **Edit Activity**. -OR- Select **Edit Activity** from the **File** menu.-OR- CTRL+O.

---

- 4 Modify the activity as needed.
- 5 Click **OK**.

➤ *To delete an activity in the call - activities screen*

- 1 Access an existing call.
- 2 Click **Activities** in the call navigation pane.
- 3 Highlight the activity you want to remove and click **Delete Activity** on the toolbar

---

-OR- Right-click and select **Delete Activity**. -OR- Select **Delete Activity** from the **File** menu.-OR- CTRL+D.

---

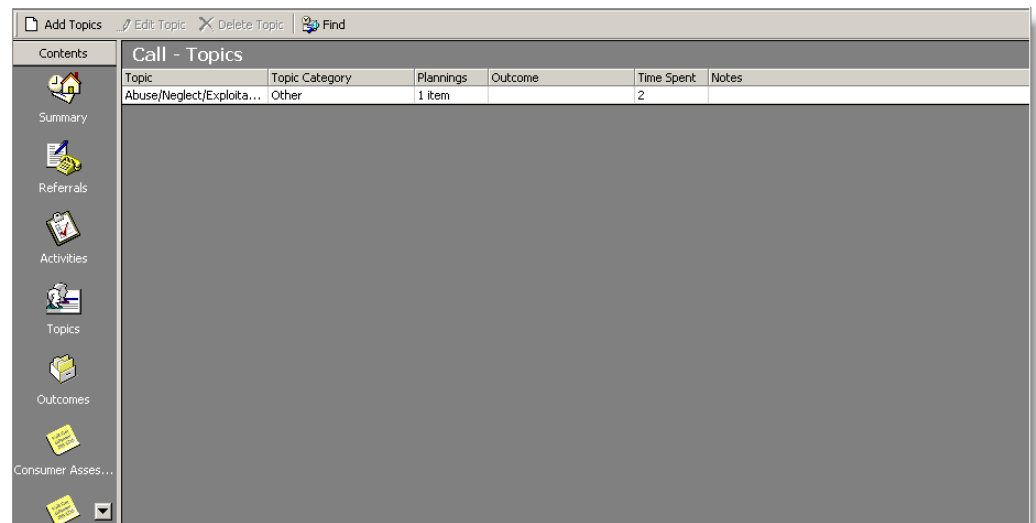
- 4 Select **Yes** at the prompt.

# Topics

*Topics* are the subjects discussed during the course of a call. You can choose multiple topics at once, or come back during the course of a call and add more.

This section looks at adding, editing, and deleting topics in the *Call - Topics* screen.

Your user role must have permission to access, create, update, and delete topics.



➤ *To enter a call topic using the call - topics screen*

- 1 Begin a new call.

---

-OR- Access an existing call. See *Editing a Call* (on page 46).

---

- 2 Click **Topics** in the call navigation pane.

- 3 Click **Add Topics** on the toolbar.

---

-OR- Right-click and select **Add Topics**. -OR- Select **Add Topics** from the File menu. -OR- CTRL+N.

---

Click either the **Topic** or **Category** heading to change the alphabetical sort order of the columns.

Include?	Topic	Category	Outcome
<input type="checkbox"/>	Abuse/Neglect/Exploitation	Other	
<input type="checkbox"/>	Adult Day	Health/In-Home Services	
<input checked="" type="checkbox"/>	Adult Foster Care (AFC)	ASAP Services	
<input type="checkbox"/>	Advance Dir. - Living Will	Other	
<input type="checkbox"/>	Assisted Living Facilities	Institutional Care	
<input type="checkbox"/>	Assistive Technology	Health/In-Home Services	
<input type="checkbox"/>	Attendant Services Prog.	Health/In-Home Services	
<input type="checkbox"/>	Budgeting/Paying Bills	Financial Assistance	
<input type="checkbox"/>	Burial Accounts/Issues	Financial Assistance	
<input type="checkbox"/>	Caring Homes	ASAP Services	
<input type="checkbox"/>	Chores	Health/In-Home Services	
<input type="checkbox"/>	City Department	Other	
<input type="checkbox"/>	Community Choices Program	ASAP Services	
<input type="checkbox"/>	Community Education (CG events, seminars...)	Other	

Time Spent: 6

Comments: Needs some assistance

Include?	Planning
<input checked="" type="checkbox"/>	Has current need or concern
<input type="checkbox"/>	Prevention or future planning

OK Cancel

If you select multiple topics, SAMS I&R copies the same Time Spent, Outcome, and Comments to each record.

- 4 Enter the minutes spent for each topic in *Time Spent*.
- 5 In the *Outcome* column, use the *Outcome* list to select the topic action that resulted from the call, if possible.
- 6 Under *Plannings*:, select the appropriate box under *Include?*.
- 7 Enter any *Comments* as needed.
- 8 When you are finished, click OK.

➤ *To edit topics in the call - topics screen*

- 1 Access an existing call.
- 2 Click Topics in the call navigation pane.
- 3 Highlight the topic you want to change and click Edit Topic on the toolbar  


---

-OR- Right-click and select Edit Activity. -OR- Select Edit Activity from the File menu.-OR- CTRL+O.  


---
- 4 Modify the topic as needed.
- 5 Click OK.

➤ *To delete an activity in the call - topics screen*

- 1** Access an existing call.
- 2** Click **Topics** in the call navigation pane.
- 3** Highlight the topic you want to remove and click **Delete Topic** on the toolbar

---

-OR- Right-click and select **Delete Topic**. -OR- Select **Delete Topic** from the **File** menu.-OR- CTRL+D.

---

- 4** Select **Yes** at the prompt.

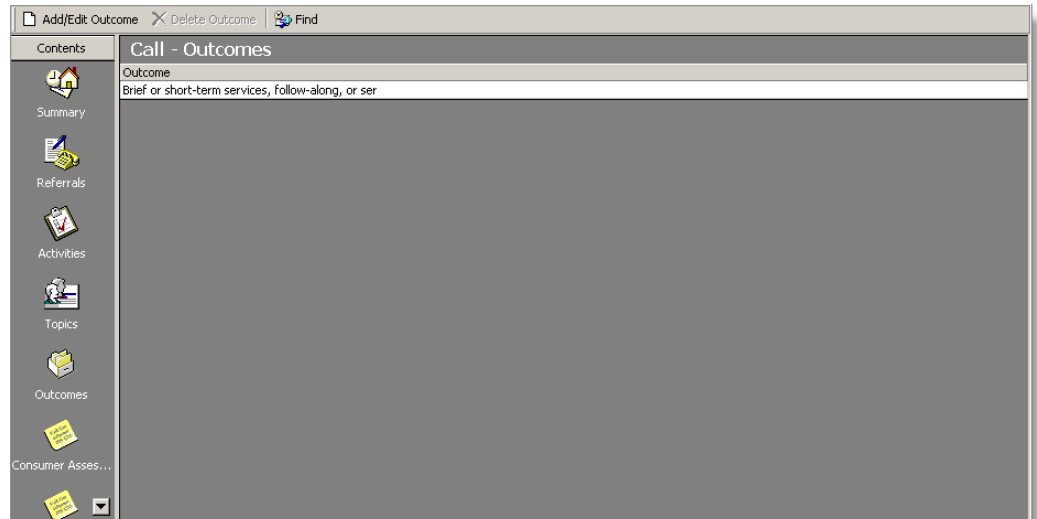
---

## Outcomes

*Call Outcomes* refers to the actions that result from a phone call. For instance, a call may refer a consumer to Adult Protective Services or Private Long Term Care services. The *Agency Call Report* displays *Call Outcome* information.

This section looks at adding, editing, and deleting outcomes from the *Call - Outcomes* screen.

Your user role must have permission to access, create, update, and delete outcomes.



➤ *To add/edit a call outcome using the call - outcomes screen*

1 Begin a new call.

---

-OR- Access an existing call. See ***Editing a Call*** (on page 46).

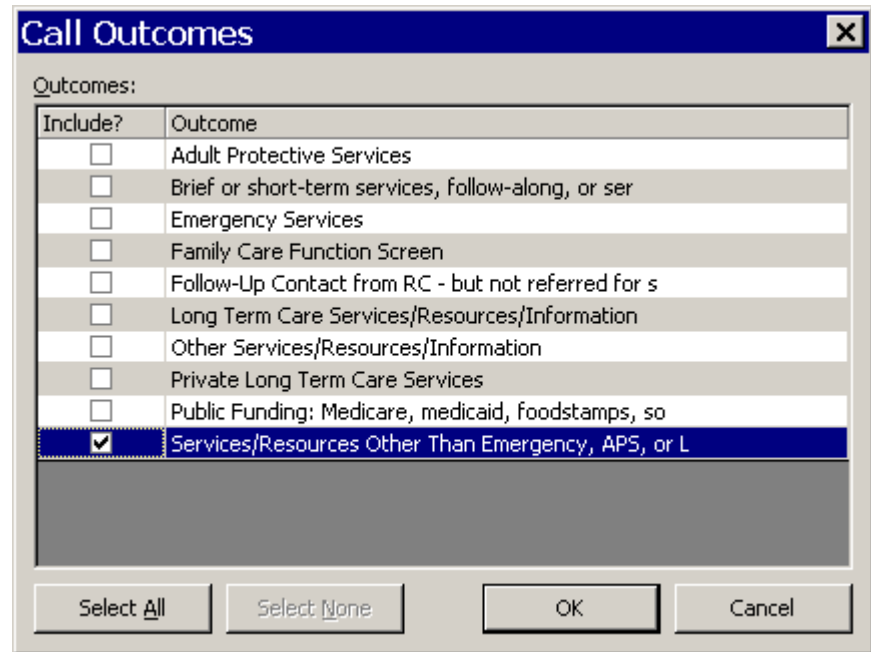
---

2 Click **Outcomes** in the call navigation pane.



- 3 To add/edit a call outcome, highlight any outcome and click **Add/Edit Outcome** on the toolbar.

-OR- Right-click and select **Add/Edit Outcome**. -OR- Select **Add/Edit Outcome** from the **File** menu. -OR- CTRL+N.



- 4 Select/deselect the appropriate outcome(s).
- 5 Click **OK**.

➤ *To delete an activity in the call - outcomes screen*

- 1 Access an existing call.
- 2 Click **Outcomes** in the call navigation pane.
- 3 Highlight the outcome you want to remove and click **Delete Outcome** on the toolbar

-OR- Right-click and select **Delete Outcome**. -OR- Select **Delete Outcome** from the **File** menu. -OR- CTRL+D.

- 4 Select **Yes** at the prompt.

## Assessments

*Assessments* allow you to make informed decisions when making referrals to consumers/callers. Both *Consumer* and *Caller Assessments* store consumer assessment sessions based on forms provided with SAMS and Omnia applications. You can use the program to create new assessments for both named and anonymous consumers/callers. Record an assessment from within a call or from within a consumer/caller record.

When you record an assessment for a named consumer/caller, the assessment can be retrieved from both the *Call Log* and the consumer/caller record. Access assessments for a current caller using the *Call - Summary* screen, or for an existing caller through their *Consumer - Summary* screen.

In the instance of an anonymous consumer, the assessment you complete will be associated with the call - not an actual person. If both the caller and consumer are anonymous, SAMS I&R only provides you with the option to add a consumer assessment, so that the anonymous caller essentially becomes both the caller and the consumer in the stored call record.

Remember that the goal of an assessment is to be able to gather enough information to make informed referrals for a consumer. With this in mind, even if the caller is named and the consumer is anonymous, you'll want to run an anonymous consumer assessment.

Your user role must have permission to view, create, update, or delete assessments. Additionally, the assessments area is subject to organizational security - meaning that access may be limited by organization.

New Assessment Edit Assessment Delete Assessment SAMSApp BenefitsCheckUp LIS Application Print History Reassess						
Contents	Abernathy, James - Consumer Assessments					
	Date of Assessment	Next Assessment ...	Assessor	Last Updated	Updated By	Assessment Form
	06/21/2007	12/21/2007		06/21/2007 02:55:5...	MAQATESTER1	Comprehensive Data Set - Ho...
Summary	05/09/2007	11/09/2007		06/21/2007 02:24:5...	MAQATESTER1	Comprehensive Data Set - Ho...
	05/31/2007	11/30/2007		05/31/2007 05:22:2...	KMACMAHON	Massachusetts Comprehensive...
Referrals	12/13/2006	06/13/2007		01/24/2007 04:14:0...	REGISTEREDNURSE	Comprehensive Data Set - Ho...
	01/24/2007	07/24/2007		01/24/2007 03:39:5...	REGISTEREDNURSE	Comprehensive Data Set - Ho...
	01/23/2007	07/23/2007		01/23/2007 03:02:5...	CASEMANAGER	Home Care Program Financial ...
Activities	01/19/2007	07/19/2007		01/19/2007 10:02:2...	Sysadmin	Comprehensive Data Set - Ho...
	01/16/2007	07/16/2007		01/16/2007 11:20:1...	Sysadmin	Home Care Program Financial ...
Topics	01/15/2007	07/15/2007		01/15/2007 10:53:2...	NUTRITIONDIRECTOR	Elderly Nutrition Program Intak...
Outcomes	12/28/2006	06/28/2007		01/04/2007 04:35:0...	CASEMANAGER	Elderly Nutrition Program Home...
Consumer Asses...	12/13/2006	06/13/2007		12/18/2006 04:24:0...	CMSUPERVISOR	Nursing Facility CSSM Asses...
	12/13/2006	06/13/2007		12/13/2006 09:54:0...	REGISTEREDNURSE	Comprehensive Data Set - Ho...

➤ *To record an assessment for a consumer/caller*

- 1 Begin a new call.

---

-OR- Access an existing call. See *Editing a Call* (on page 46).

---

- 2 Click Consumer Assessments or Caller Assessments in the call navigation pane.

- 3 Click New Assessment on the toolbar.

---

-OR- Right-click and select New Assessment. -OR- Select New Assessment from File menu. -OR- CTRL+N.

---

- 4 Use the *Filename* list to select the appropriate assessment form for this consumer. If there are no forms available, select [Browse..].
- 5 Enter your name in Assessor. You can choose to password protect this assessment by entering a Password and then entering it again in *Verify Password*. SAMS I&R automatically enters the *Date of Assessment* and *Next Assessment Date* using today's date and the *Reassessment Date* default.
- 6 Click OK.
- 7 SAMS may prompt you that your assessment contains indicators that need to be saved. If the prompt appears, click **Yes** to continue.

- 8 Enter data into the assessment as outlined in the SAMS User's Guide or Help files. Access the Help files by selecting Search from the Help menu and entering the appropriate terms.

A.1. APPLICANT INFORMATION	
a.1. Applicant's Last Name?	Abernathy
a.2. Applicant's First Name?	Joseph
a.3. Applicant's Middle Initial?	A
b. Applicant's Date of Birth	05/04/1951
c. Address	7 LOCKSLEY ST
d. City/Town	Acushnet
e. Does the Applicant have a Spouse?	Yes
f. If Yes, is the spouse also an applicant?	
g. Spouse's Name	
h. Spouse's Date of Birth	

- 9 When finished, click Save and Close.

➤ *To edit consumer/caller assessments*

- 1 Access an existing call.
  - 2 Click Consumer Assessments or Caller Assessments in the call navigation pane.
  - 3 Highlight the assessment you want to change and click Edit Assessment on the toolbar
- 
- OR- Right-click and select Edit Assessment. -OR- Select Assessment from the File menu.-OR- CTRL+O.
- 
- 4 Modify the assessment as needed.
  - 5 When finished, click Save and Close.

➤ *To delete consumer/caller assessments*

- 1 Access an existing call.
  - 2 Click Consumer Assessments or Caller Assessments in the call navigation pane.
  - 3 Highlight the assessment you want to remove and click Delete Assessment on the toolbar
- 
- OR- Right-click and select Delete Assessment. -OR- Select Delete Assessment from the File menu.-OR- CTRL+D.
-

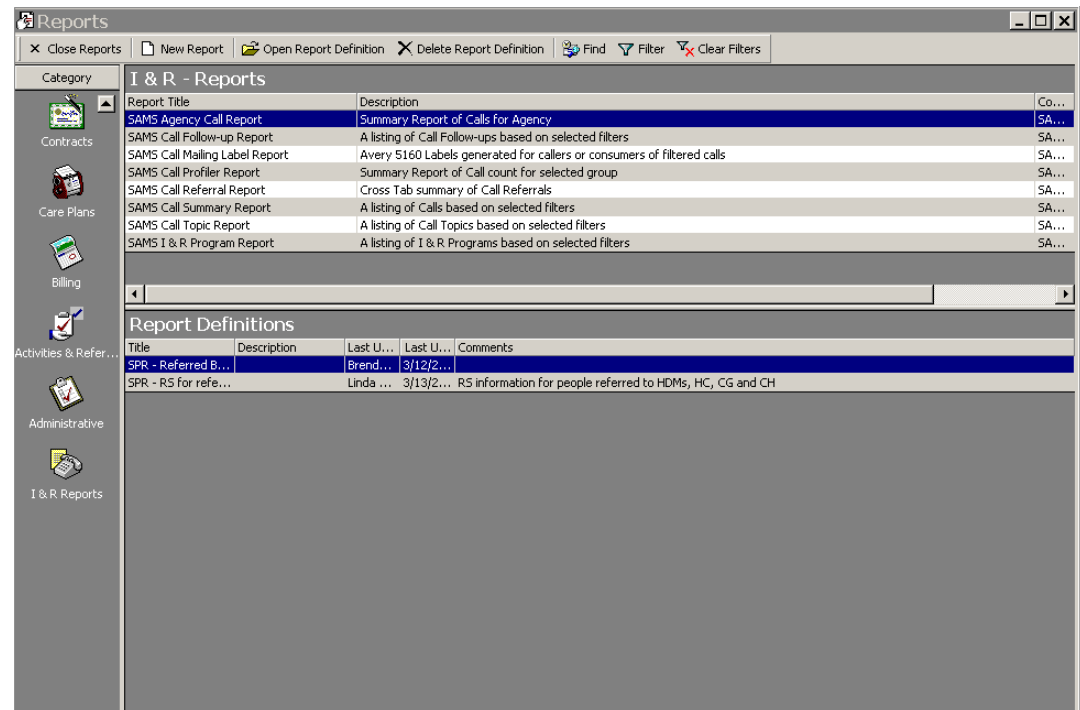
- 4 Select Yes at the prompt.



# Reports

SAMS offers several highly customizable *I&R Reports* that help you make the most of your organization's call information.

Your user role must have permission to access, create, update, and delete reports.



## Report Summaries

- SAMS Agency Call Report - Summary Report of Calls for Agency.
- SAMS Call Follow-up Report - A listing of Call Follow-ups based on selected filters.
- SAMS Call Mailing Label Report - Avery 5160 Labels generated for callers or consumers of filtered calls.
- SAMS Call Profiler Report - Summary report of Call count for selected group.
- SAMS Call Referral Report - Cross Tab summary of Call Referrals.

- SAMS Call Topic Report - A listing of Call Topics based on selected filters.
- SAMS I & R Program Report - A listing of I & R Programs based on selected filters.

For information about using **Reports**, see the SAMS User's Guide or SAMS **Help** files.



# I&R Administration

This section of the manual explains what you need to know to set up SAMS Administrator for SAMS I&R.

Since the *SAMS Administrator's Guide* outlines the necessary details and step-by-step procedures needed to configure your database, this guide only provides an overview of the additions to SAMS Administrator that support the I&R integration.

If you find that you want more information about a certain area, or if you want step-by-step procedures, refer to the *Administrator's Guide* or the SAMS Administrator Help files.

## Getting Started

First, use the table in the ***Data Administration Overview*** (on page 70) section to familiarize yourself with the new location of BeaconIR's *Data Administration* elements within SAMS Administrator. Then, read through ***Access Role Privileges*** (on page 79), ***Associating Taxonomies*** (on page 75), ***Setting Up Agencies*** (on page 74), ***Setting Up Provider Organizations*** (on page 76), ***I&R Configuration*** (on page 80), and ***I&R Reports*** (on page 78). These are the new areas that you need to be aware of for use with SAMS I&R.

---

## Data Administration Overview

Use the table on the following pages to familiarize yourself with the new location of BeaconIR's *Data Administration* elements within SAMS Administrator.

The first column lists BeaconIR's *Data Administration* setup by area and subarea. For instance, *Keywords* was a subarea of the **General** area.

The second column lists the new location of the area in SAMS Administrator. You'll see that in many instances the areas and subareas have not changed - you'll still find the *Keywords* subarea under the **General** area. Shaded areas in the table indicate specific areas/subareas where name or location might be different than what you're used to.

You can add, modify, and delete most fields that appear under subareas. See the SAMS Administrator's Guide or Administrator **Help** files for related procedures.

It is important to note that if you RENAME any field name descriptions in Keywords, Eligibilities, Accessibilities Types, Disability Types, or any other subarea that appear when searching for *referrals* (see "Creating Referrals" on page 30), you **MUST** rebuild the cache in ***I&R Configuration*** (on page 80). Otherwise, SAMS users cannot use these fields to search for referrals.

<b>SAMS I&amp;R Setup within SAMS Administrator</b>		
<b>BeaconIR Data Administration Setup</b>	<b>Equivalent in SAMS Admin</b>	<b>Example of Fields Populated in SAMS I&amp;R</b>
Area: General Subarea: Eligibilities	Area: General Subarea: Eligibilities	Referrals <i>Search for Services</i> screen (if used as a provider eligibility search term)
Area: General Subarea: Fees	Not Currently Implemented	
Area: General Subarea: Follow Up Activities	Area: Program Definition Subarea: Actions	Activities
Area: General Subarea: Keywords	Area: General Subarea: Keywords	Referrals <i>Search for Services</i> screen (if used as a search term)
Area: General Subarea: Services	Area: Program Definition Subarea: Services	Service Deliveries, Referrals <i>Search for Services</i> screen (if used as a search term)
Area: General Subarea: Titles	Not Implemented	
Area: General Subarea: Referred By	Area: General Subarea: Referred By	Caller Types
Area: General Subarea: Reason Codes	Area: General Subarea: Reason Codes	Activities
Area: General Subarea: Planning	Area: General Subarea: Planning	Topics

SAMS I&R Setup within SAMS Administrator		
BeaconIR Data Administration Setup	Equivalent in SAMS Admin	Example of Fields Populated in SAMS I&R
Area: General Subarea: Priorities	Area: General Subarea: Priorities	Call Priority
Area: General Subarea: ADRC Activities	Area: General Subarea: Call Outcomes	Call Outcomes
Area: General Subarea: Age Groups	Not Currently Implemented	
Area: Types Subarea: Phone Types	Area: Types Subarea: Phone Types	Assessments
Area: Types Subarea: Accessibility Types	Area: Types Subarea: Accessibility Types	Referrals <i>Search for Services</i> screen (if used as a provider accessibility search term)
Area: Types Subarea: Resource Types	Not Implemented	
Area: Types Subarea: Call Types	Area: Types Subarea: Call Types	Call Type
Area: Types Subarea: Disability Types	Area: Types Subarea: Disability Types	Referrals <i>Search for Services</i> screen (if used as a search term)
Area: Organization Subarea: Resources	Area: Organization Subarea: Providers (Organizations ONLY)	Referrals <i>Search for Services</i> screen (if used as a search term), Service Deliveries
Area: Organization Subarea: Programs	Area: Program Definition Subarea: Service Programs	Referrals <i>Search for Services</i> screen (if used as a search term), Service Deliveries
Area: Organization Subarea: Sites	Area: Organization Subarea: Sites	Referrals <i>Search for Services screen</i> (if used as a search term), Service Deliveries

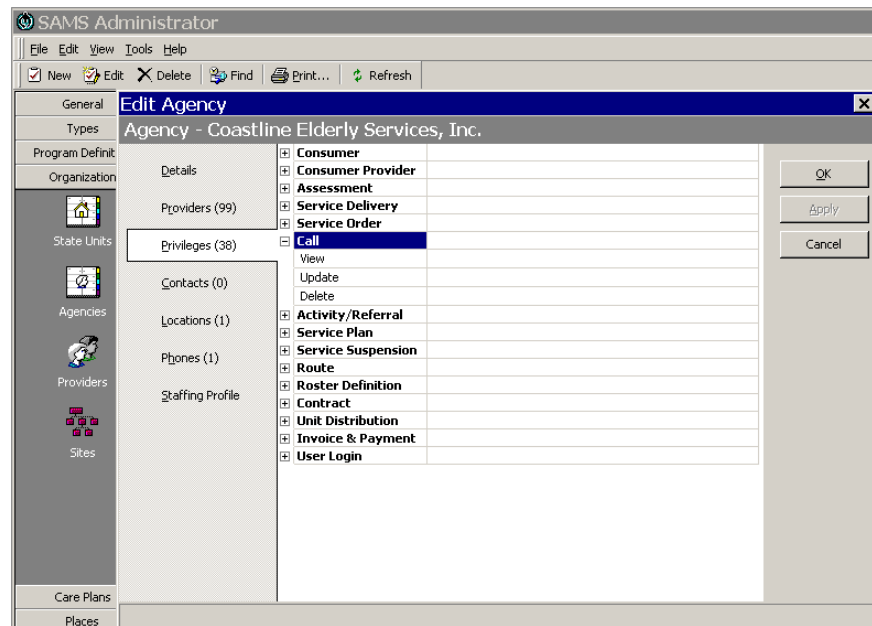
With the exception of *Regions*, we have not included any other **Places** subareas because they work the same. You will still need to enter *Zip Codes*, for instance, if you want to include addresses in your database.

Area: Organization Subarea: Services	Area: Program Definition Subarea: Services	Referrals <i>Search for Services</i> screen (if used as a search term), Service Deliveries
Area: Places Subarea: Regions	Area: Places Subarea: Regions	Referrals <i>Search for Services</i> screen (if used as a search term)
Area: Program Definition Subarea: Topic Categories	Area: Program Definition Subarea: Topic Categories	Topics
Area: Program Definition Subarea: Topics	Area: Program Definition Subarea: Topics	Topics
Area: Program Definition Subarea: Outcomes	Area: Program Definition Subarea: Topic Outcomes	Topics

## Setting Up Agencies

Access **Agencies** under **Organization**.

A **Call** heading has been added to the **Privileges** area of the *Agency* record in SAMS Administrator. Use this to enforce organizational security in the viewing of call records. For example, if you administer the Sunshine Valley Agency's database and you only want that agency's users to be able to look at or change Sunshine Valley call records, you can set that up here.



## Associating Taxonomies

A taxonomy is a classification of services that is used when searching for referrals.

A new *Taxonomies* area has been added to the *Add/Edit Service* record (under **Program Definition**). You need to associate services with taxonomies so that when a user enters taxonomy-related search criteria during a referral search, the appropriate services appear. Multiple taxonomies can be associated with a service.

Associating items within **Program Definition** and **Organization** provides SAMS I&R users with the detailed information they need to create referrals during a call. For example, **Provider Organizations** (see "Setting Up Provider Organizations" on page 76) are associated with *Services*. So by associating an organization with a service, you are linking taxonomies to that organization, as well.

See the SAMS Administrator's Guide or **Help** files for more details about program associations.

In addition to taxonomies and services, a user can also search on *Eligibilities*, *Keywords*, *Disabilities* and more to generate referrals.

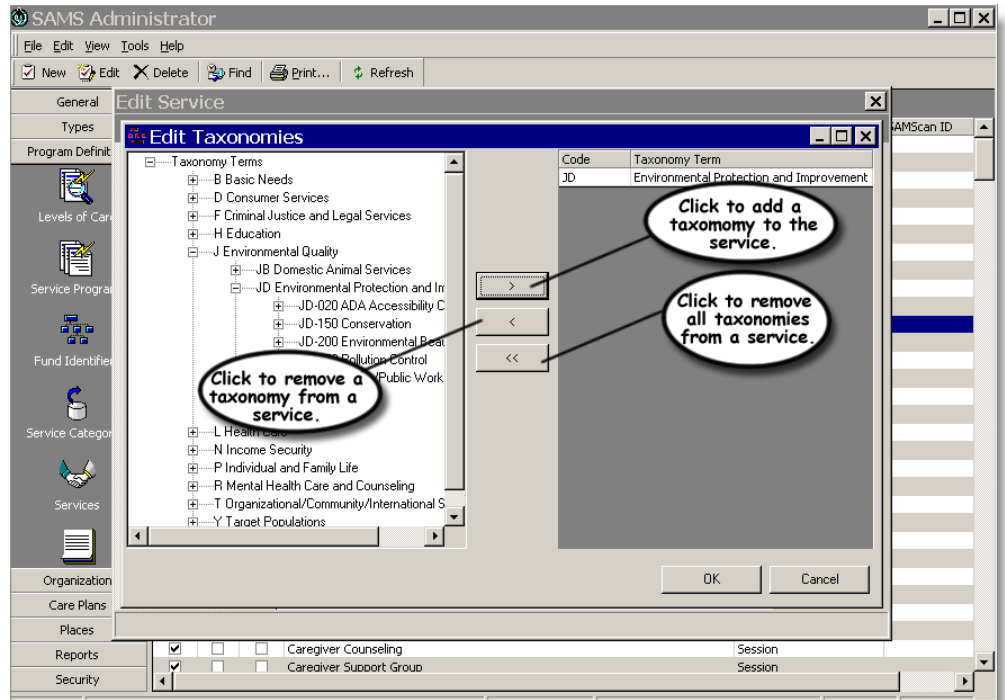
You cannot add, change, or remove the taxonomies available. They are provided by the Alliance of Information & Referral Systems (AIRS), and are built-in to the database.

It is important to note that if you add service taxonomies, you **MUST** rebuild the cache in **I&R Configuration** (on page 80). Otherwise, SAMS users cannot use these terms to search for referrals.

### ➤ *To add a taxonomy to a service*

- 1** Click the **Program Definition** heading in the navigation pane.
- 2** Click *Services*.
- 3** Add or edit a service record as outlined in the *Administrator's Guide*.
- 4** Click **Taxonomies**.
- 5** Add or remove taxonomies as needed.

6 Click OK when you are done.





## Setting Up Provider Organizations

Access *Provider Organizations* in **Providers** under **Organization**.

Only *Provider Organizations* impact SAMS I&R. New fields and headings have been added to the *Details* area of the *Provider* record. For the most part, these additions are reflected when searching for and creating referrals.

- **Details:** *Short Description*, *Long Description*, and *Url* fields have been added. The *Short Description* field only holds up to 100 characters. *Long Description* is a memo field that can hold much more program detail. Use *Url* to enter a Web site address.
- **Billing and Hours of Operation** headings have also been added. Use **Billing** to define an organization's *Is Affordable* status, as well as to specify whether it *Accepts Medicaid*, *Medicare*, and/or *Private Insurance*. Use **Hours of Operation** to define an organizations operating hours according to week day.

**Edit Provider**  
Provider - 1550 Beacon Street

Details	
Name	1550 Beacon Street
Short Description	
Long Description	
Notes	
Medical Assistance ID	
Start Date	01/01/1980
End Date	
Universal PIN	
NPI	
Hipaa Taxonomy	
Url	
Email Address	
Certified with Medical Assistance	No
Minority Provider	No
For Profit	Yes
Active	Yes
Local	No
Is Rural	No
<b>Billing</b>	
<b>Hours of Operation</b>	

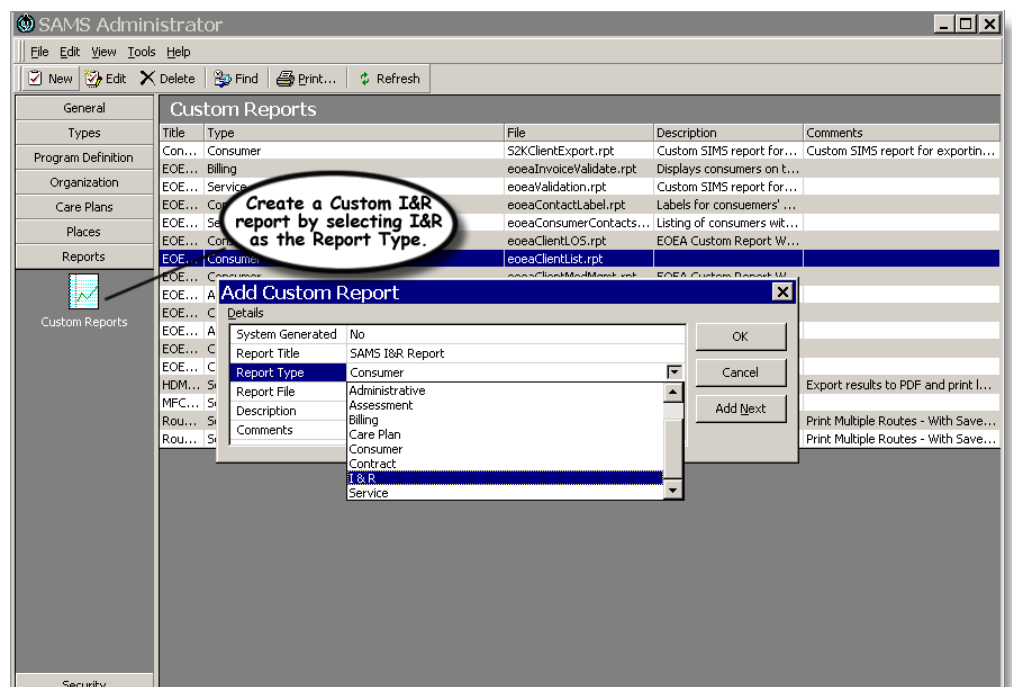
OK  
Apply  
Cancel

# I&R Reports

Access Custom Reports under Reports.

You can now create custom SAMS I&R Reports in SAMS Administrator. A new *Report Type* of I&R has been added to the *Add/Edit Custom Report* list.

See the *Administrator's Guide* or the SAMS Administrator Help files for more information about creating reports.



## Access Role Privileges

*Access Roles* are a subarea of **Security**. Before setting up access role privileges, you must first create *User Logins* and associate them with user *Roles*.

See the Administrator's **Guide** or **Help** files for more information or step-by-step procedures.

**Edit Access Role**  
Access Role - Administrator

Item	Access	Create	Update	Delete
Call Referral	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Call Service Deliveries	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Call Topics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Consumer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Consumer Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I & R Consumer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I & R Consumer Assessments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I & R Consumer Call	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I & R Consumer Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I & R Consumer Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I & R Consumer Ethnic Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I & R Consumer Journal Entry	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I & R Consumer Locations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I & R Consumer Phones	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I & R Consumer User Field	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Invoices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Merge	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Merge Consumer Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Merge Consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Merge I & R Consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Action Reports	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Administrative Reports	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

249 Items

OK  
Apply  
Cancel  
Select All  
Deselect All  
Print Grid  
Expand All  
Collapse All

## Privileges

Under *Access Roles*, many new *Privileges* have been added - for both SAMS and SAMS Administrator.

For SAMS users, privileges primarily fall into two categories: *Call* and *I&R Consumer*. *Call* privileges are related to the act of actually taking a call and adding topics, referrals, etc., while *I&R Consumer* privileges are related to accessing I&R Consumer information and *Call Log* history.

In SAMS Administrator, you're generally giving administrative-level users permission to access, create, update, and delete the I&R fields and settings that appear in SAMS.

---

## I&R Configuration

An I&R tab has been added to the *SAMS' Global Configuration* dialog (located in the **Tools>Configuration** menu).

- *Call Service Delivery Option* - decide how you want service deliveries to be recorded when saving a call. Choose to have SAMS automatically record units of service against a consumer (or a consumer group if the caller is anonymous), to prompt users to record units of service when saving a call, to have SAMS automatically record units of service against the call's consumer, or to not record units of service at all upon saving a new call.
- *Allow users to override I&R Configuration* - if you select this option, users can change the I&R settings you have in place.
- *Default Hours of Operation* - you can enter a default *Time Open* and *Time Close*.
- *Disclaimer* - enter disclaimer text that will be included on the page footer of the *Call Summary* Report, the *Call Summary*, and the *SAMS I&R Program* Report.

- *Rebuild Cache* - the I&R cache stores information used during referral searches. SAMS updates the cache automatically **ONLY** when a provider is modified. There are times when it is necessary for you to update (rebuild) the cache so that users have access to the most up-to-date search information:
  - If you rename keywords, eligibilities, accessibilities, or other SAMS Administrator subareas that are used in referral searches.
  - If you add service taxonomies.
  - If you import provider-related data from IE.

